



**Part III Statement of Program Service Accomplishments**Check if Schedule O contains a response or note to any line in this Part III ☐**1** Briefly describe the organization's mission

The mission of the organization is to improve the health of the people in our communities every day, with quality and compassion

**2** Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? ☐ Yes ☒ No

If "Yes," describe these new services on Schedule O

**3** Did the organization cease conducting, or make significant changes in how it conducts, any program services? ☐ Yes ☒ No

If "Yes," describe these changes on Schedule O

**4** Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported

<b>4a</b>	(Code )	(Expenses \$	585,194,802	including grants of \$	18,387,538	(Revenue \$	675,576,247 )
See Additional Data							

<b>4b</b>	(Code )	(Expenses \$	442,469,146	including grants of \$		(Revenue \$	430,577,899 )
See Additional Data							

<b>4c</b>	(Code )	(Expenses \$	38,856,601	including grants of \$		(Revenue \$	38,978,909 )
See Additional Data							

	(Code )	(Expenses \$	120,407,335	including grants of \$		(Revenue \$	218,087,639 )
--	---------	--------------	-------------	------------------------	--	-------------	---------------

**4d** Other program services (Describe in Schedule O )

(Expenses \$	120,407,335	including grants of \$		(Revenue \$	218,087,639 )
--------------	-------------	------------------------	--	-------------	---------------

**4e Total program service expenses ►** 1,186,927,884

**Part IV Checklist of Required Schedules**

	Yes	No
<b>1</b> Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If "Yes," complete Schedule A	<b>1</b> Yes	
<b>2</b> Is the organization required to complete Schedule B, Schedule of Contributors (see instructions)?	<b>2</b> Yes	
<b>3</b> Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I	<b>3</b>	No
<b>4 Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part II	<b>4</b> Yes	
<b>5</b> Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? If "Yes," complete Schedule C, Part III	<b>5</b>	No
<b>6</b> Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I	<b>6</b>	No
<b>7</b> Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II	<b>7</b>	No
<b>8</b> Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III	<b>8</b>	No
<b>9</b> Did the organization report an amount in Part X, line 21 for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X, or provide credit counseling, debt management, credit repair, or debt negotiation services? If "Yes," complete Schedule D, Part IV	<b>9</b>	No
<b>10</b> Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? If "Yes," complete Schedule D, Part V	<b>10</b>	No
<b>11</b> If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable		
<b>a</b> Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D, Part VI	<b>11a</b> Yes	
<b>b</b> Did the organization report an amount for investments—other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII	<b>11b</b> Yes	
<b>c</b> Did the organization report an amount for investments—program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII	<b>11c</b>	No
<b>d</b> Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part IX	<b>11d</b>	No
<b>e</b> Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X	<b>11e</b> Yes	
<b>f</b> Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If "Yes," complete Schedule D, Part X	<b>11f</b>	No
<b>12a</b> Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete Schedule D, Parts XI and XII	<b>12a</b>	No
<b>b</b> Was the organization included in consolidated, independent audited financial statements for the tax year? If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional	<b>12b</b> Yes	
<b>13</b> Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E	<b>13</b>	No
<b>14a</b> Did the organization maintain an office, employees, or agents outside of the United States?	<b>14a</b>	No
<b>b</b> Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? If "Yes," complete Schedule F, Parts I and IV	<b>14b</b>	No
<b>15</b> Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? If "Yes," complete Schedule F, Parts II and IV	<b>15</b>	No
<b>16</b> Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? If "Yes," complete Schedule F, Parts III and IV	<b>16</b>	No
<b>17</b> Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I (see instructions)	<b>17</b>	No
<b>18</b> Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If "Yes," complete Schedule G, Part II	<b>18</b>	No
<b>19</b> Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes," complete Schedule G, Part III	<b>19</b>	No
<b>20a</b> Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H	<b>20a</b> Yes	
<b>b</b> If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?	<b>20b</b> Yes	
<b>21</b> Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? If "Yes," complete Schedule I, Parts I and II	<b>21</b> Yes	
<b>22</b> Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III	<b>22</b> Yes	

**Part IV Checklist of Required Schedules (continued)**

		Yes	No
<b>23</b>	Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If "Yes," complete Schedule J</i> . . . . .	<b>23</b> Yes	
<b>24a</b>	Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a</i> . . . . .	<b>24a</b> Yes	
<b>b</b>	Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? . . . . .	<b>24b</b>	No
<b>c</b>	Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? . . . . .	<b>24c</b>	No
<b>d</b>	Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? . . . . .	<b>24d</b>	No
<b>25a</b>	<b>Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I</i> . . . . .	<b>25a</b>	No
<b>b</b>	Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I</i> . . . . .	<b>25b</b>	No
<b>26</b>	Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? <i>If "Yes," complete Schedule L, Part II</i> . . . . .	<b>26</b>	No
<b>27</b>	Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? <i>If "Yes," complete Schedule L, Part III</i> . . . . .	<b>27</b>	No
<b>28</b>	Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions)		
<b>a</b>	A current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i> . . . . .	<b>28a</b>	No
<b>b</b>	A family member of a current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i> . . . . .	<b>28b</b> Yes	
<b>c</b>	An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? <i>If "Yes," complete Schedule L, Part IV</i> . . . . .	<b>28c</b>	No
<b>29</b>	Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i> . . . . .	<b>29</b>	No
<b>30</b>	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i> . . . . .	<b>30</b>	No
<b>31</b>	Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i> . . . . .	<b>31</b>	No
<b>32</b>	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i> . . . . .	<b>32</b>	No
<b>33</b>	Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i> . . . . .	<b>33</b> Yes	
<b>34</b>	Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1</i> . . . . .	<b>34</b> Yes	
<b>35a</b>	Did the organization have a controlled entity within the meaning of section 512(b)(13)?	<b>35a</b> Yes	
<b>b</b>	If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2</i> . . . . .	<b>35b</b>	No
<b>36</b>	<b>Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i> . . . . .	<b>36</b> Yes	
<b>37</b>	Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI</i> . . . . .	<b>37</b>	No
<b>38</b>	Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? <b>Note.</b> All Form 990 filers are required to complete Schedule O . . . . .	<b>38</b> Yes	

**Part V Statements Regarding Other IRS Filings and Tax Compliance**Check if Schedule O contains a response or note to any line in this Part V . . . . . ☐

		Yes	No
<b>1a</b>	Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable . . . . .	<b>1a</b> 491	
<b>b</b>	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable . . . . .	<b>1b</b> 0	
<b>c</b>	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners? . . . . .	<b>1c</b> Yes	

<b>2a</b> Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return . . . . .		<b>2a</b>	8,445			
<b>b</b> If at least one is reported on line 2a, did the organization file all required federal employment tax returns? <b>Note.</b> If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions)				<b>2b</b>	Yes	
<b>3a</b> Did the organization have unrelated business gross income of \$1,000 or more during the year? . . . . .				<b>3a</b>	Yes	
<b>b</b> If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation in Schedule O . . . . .				<b>3b</b>	Yes	
<b>4a</b> At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)? . . . . .				<b>4a</b>		No
<b>b</b> If "Yes," enter the name of the foreign country <span style="border-bottom: 1px solid black; display: inline-block; width: 200px;"></span> See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR)						
<b>5a</b> Was the organization a party to a prohibited tax shelter transaction at any time during the tax year? . . . . .				<b>5a</b>		No
<b>b</b> Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?				<b>5b</b>		No
<b>c</b> If "Yes," to line 5a or 5b, did the organization file Form 8886-T? . . . . .				<b>5c</b>		
<b>6a</b> Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions? . . . . .				<b>6a</b>		No
<b>b</b> If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible? . . . . .				<b>6b</b>		
<b>7 Organizations that may receive deductible contributions under section 170(c).</b>						
<b>a</b> Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor? . . . . .				<b>7a</b>		No
<b>b</b> If "Yes," did the organization notify the donor of the value of the goods or services provided? . . . . .				<b>7b</b>		
<b>c</b> Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282? . . . . .				<b>7c</b>		No
<b>d</b> If "Yes," indicate the number of Forms 8282 filed during the year . . . . .				<b>7d</b>		
<b>e</b> Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?				<b>7e</b>		No
<b>f</b> Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? . . . . .				<b>7f</b>		No
<b>g</b> If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required? . . . . .				<b>7g</b>		
<b>h</b> If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C? . . . . .				<b>7h</b>		
<b>8 Sponsoring organizations maintaining donor advised funds.</b> Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year? . . . . .						
				<b>8</b>		
<b>9a</b> Did the sponsoring organization make any taxable distributions under section 4966? . . . . .				<b>9a</b>		
<b>b</b> Did the sponsoring organization make a distribution to a donor, donor advisor, or related person? . . . . .				<b>9b</b>		
<b>10 Section 501(c)(7) organizations.</b> Enter						
<b>a</b> Initiation fees and capital contributions included on Part VIII, line 12 . . . . .				<b>10a</b>		
<b>b</b> Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities				<b>10b</b>		
<b>11 Section 501(c)(12) organizations.</b> Enter						
<b>a</b> Gross income from members or shareholders . . . . .				<b>11a</b>		
<b>b</b> Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them ) . . . . .				<b>11b</b>		
<b>12a Section 4947(a)(1) non-exempt charitable trusts.</b> Is the organization filing Form 990 in lieu of Form 1041?						
<b>b</b> If "Yes," enter the amount of tax-exempt interest received or accrued during the year				<b>12b</b>		
<b>13 Section 501(c)(29) qualified nonprofit health insurance issuers.</b>						
<b>a</b> Is the organization licensed to issue qualified health plans in more than one state? <b>Note.</b> See the instructions for additional information the organization must report on Schedule O				<b>13a</b>		
<b>b</b> Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans . . . . .				<b>13b</b>		
<b>c</b> Enter the amount of reserves on hand . . . . .				<b>13c</b>		
<b>14a</b> Did the organization receive any payments for indoor tanning services during the tax year? . . . . .				<b>14a</b>		No
<b>b</b> If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O . . . . .				<b>14b</b>		
<b>15</b> Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year? If "Yes," see instructions and file Form 4720, Schedule N . . . . .				<b>15</b>		No
<b>16</b> Is the organization an educational institution subject to the section 4968 excise tax on net investment income? If "Yes," complete Form 4720, Schedule O . . . . .				<b>16</b>		No

**Part VI Governance, Management, and Disclosure** For each "Yes" response to lines 2 through 7b below, and for a "No" response to lines 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.  
Check if Schedule O contains a response or note to any line in this Part VI ☒

### Section A. Governing Body and Management

		Yes	No
<b>1a</b>	Enter the number of voting members of the governing body at the end of the tax year		
	If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O		
<b>b</b>	Enter the number of voting members included in line 1a, above, who are independent		
<b>2</b>	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?	Yes	
<b>3</b>	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person?	Yes	
<b>4</b>	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?		No
<b>5</b>	Did the organization become aware during the year of a significant diversion of the organization's assets?		No
<b>6</b>	Did the organization have members or stockholders?	Yes	
<b>7a</b>	Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?	Yes	
<b>b</b>	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?		No
<b>8</b>	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following		
<b>a</b>	The governing body?	Yes	
<b>b</b>	Each committee with authority to act on behalf of the governing body?	Yes	
<b>9</b>	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O		No

### Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

		Yes	No
<b>10a</b>	Did the organization have local chapters, branches, or affiliates?		No
<b>b</b>	If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?		
<b>11a</b>	Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?	Yes	
<b>b</b>	Describe in Schedule O the process, if any, used by the organization to review this Form 990		
<b>12a</b>	Did the organization have a written conflict of interest policy? If "No," go to line 13	Yes	
<b>b</b>	Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	Yes	
<b>c</b>	Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this was done	Yes	
<b>13</b>	Did the organization have a written whistleblower policy?	Yes	
<b>14</b>	Did the organization have a written document retention and destruction policy?	Yes	
<b>15</b>	Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?		
<b>a</b>	The organization's CEO, Executive Director, or top management official		No
<b>b</b>	Other officers or key employees of the organization	Yes	
	If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions)		
<b>16a</b>	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?	Yes	
<b>b</b>	If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements?	Yes	

### Section C. Disclosure

**17** List the States with which a copy of this Form 990 is required to be filed: **MA**

**18** Section 6104 requires an organization to make its Form 1023 (or 1024-A if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.  
☐ Own website ☐ Another's website ☒ Upon request ☐ Other (explain in Schedule O)

**19** Describe in Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.

**20** State the name, address, and telephone number of the person who possesses the organization's books and records  
**►Raymond McCarthy Baystate Health 759 Chestnut Street Springfield, MA 01199 (413) 794-0000**

## Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

Check if Schedule O contains a response or note to any line in this Part VII ☒

☒

● List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.

● List all of the organization's **current** key employees, if any. See instructions for definition of "key employee."

• List the organization's five **current** highest compensated employees (other than an officer, director, trustee or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations

● List all of the organization's **former** officers, key employees, or highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations

• List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations

List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons

☐ Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee

[illegible]

**Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)**

[illegible]

<b>1b Sub-Total</b>			
<b>c Total from continuation sheets to Part VII, Section A</b>			
<b>d Total (add lines 1b and 1c)</b>	3,112,810	5,781,364	646,498

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization ▶ 595

		Yes	No
3	Did the organization list any <b>former</b> officer, director or trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual . . . . .</i>	3	No
4	For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? <i>If "Yes," complete Schedule J for such individual . . . . .</i>	4	Yes
5	Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? <i>If "Yes," complete Schedule J for such person . . . . .</i>	5	Yes

## Section B. Independent Contractors

**1** Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

(A)	(B)	(C)
Name and business address	Description of services	Compensation
Baystate Administrative Services Inc 759 Chestnut Street Springfield, MA 01199	Management Svcs	96,965,205
Baystate Medical Practices Inc 759 Chestnut Street Springfield, MA 01199	Medical, Educ, Clin	69,915,635
Shiftwise 1800 SW 1st Ave Suite 510 Portland, OR 97201	Contract Svcs	11,896,633
Shields Specialty Pharmacy of Springfiel 1200 Hancock St 300 Quincy, MA 02169	Management Svcs	9,459,431
Crothall Healthcare Inc 13028 Collections Center Drive Chicago, IL 60693	Contract Svcs	5,533,730

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization ► 126



Form 990 (2018)		Page 9					
Part VIII		Statement of Revenue					
Check if Schedule O contains a response or note to any line in this Part VIII . . . . . <input type="checkbox"/>							
		(A)	(B)	(C)	(D)		
		Total revenue	Related or exempt function revenue	Unrelated business revenue	Revenue excluded from tax under sections 512 - 514		
Contributions, Gifts, Grants and Other Similar Amounts	1a Federated campaigns . . . . .	1a					
	b Membership dues . . . . .	1b					
	c Fundraising events . . . . .	1c					
	d Related organizations	1d	3,018,991				
	e Government grants (contributions)	1e	4,642,468				
	f All other contributions, gifts, grants, and similar amounts not included above	1f	1,407,192				
	g Noncash contributions included in lines 1a - 1f \$ _____						
	h Total. Add lines 1a-1f . . . . . ▶		9,068,651				
Program Service Revenue			Business Code				
	2a Inpatient Revenue	622110	699,146,510	699,146,510			
	b Outpatient Revenue	622110	577,856,983	568,996,042	8,860,941		
	c Sponsored Programs	622110	10,738,285	10,738,285			
	d MCD Waiver Safety Net	622110	5,259,378	5,259,378			
	e Intercompany Rent	622110	2,718,821	2,718,821			
	f All other program service revenue		1,200,000	1,200,000			
	g Total. Add lines 2a-2f . . . . . ▶		1,296,919,977				
Other Revenue	3 Investment income (including dividends, interest, and other similar amounts) . . . . . ▶		6,292,102			6,292,102	
	4 Income from investment of tax-exempt bond proceeds ▶						
	5 Royalties . . . . . ▶						
			(i) Real	(ii) Personal			
	6a Gross rents	391,555					
	b Less rental expenses	542,023					
	c Rental income or (loss)	-150,468					
	d Net rental income or (loss) . . . . . ▶		-150,468			-150,468	
			(i) Securities	(ii) Other			
	7a Gross amount from sales of assets other than inventory	4,192,821	1,355,374				
	b Less cost or other basis and sales expenses	8,805,117	1,355,008				
	c Gain or (loss)	-4,612,296	366				
	d Net gain or (loss) . . . . . ▶		-4,611,930			-4,611,930	
	8a Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c) See Part IV, line 18 . . . . . a						
	b Less direct expenses . . . . . b						
	c Net income or (loss) from fundraising events . . . . . ▶						
	9a Gross income from gaming activities See Part IV, line 19 . . . . . a						
	b Less direct expenses . . . . . b						
c Net income or (loss) from gaming activities . . . . . ▶							
10a Gross sales of inventory, less returns and allowances . . . . . a							
b Less cost of goods sold . . . . . b							
c Net income or (loss) from sales of inventory . . . . . ▶							
Miscellaneous Revenue		Business Code					
11a Pharmacy Service	622110	40,110,219	40,110,219				
b Intercompany Charges	622110	23,755,207	23,755,207				
c Cafeteria Income	622110	6,593,694			6,593,694		
d All other revenue . . . . .		11,317,704	11,296,232	20,181	1,291		
e Total. Add lines 11a-11d . . . . . ▶		81,776,824					
12 Total revenue. See Instructions . . . . . ▶		1,389,295,156	1,363,220,694	8,881,122	8,124,689		

Form 990 (2018)

**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX ☒**Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.**

	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
<b>1</b> Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21.	18,357,977	18,357,977		
<b>2</b> Grants and other assistance to domestic individuals. See Part IV, line 22.	29,561	29,561		
<b>3</b> Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, line 15 and 16.				
<b>4</b> Benefits paid to or for members.				
<b>5</b> Compensation of current officers, directors, trustees, and key employees.	399,442	399,442		
<b>6</b> Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B).	134,420	134,420		
<b>7</b> Other salaries and wages.	457,279,194	423,027,362	34,251,832	
<b>8</b> Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions).	19,937,127	18,441,932	1,495,195	
<b>9</b> Other employee benefits.	47,341,354	43,796,290	3,545,064	
<b>10</b> Payroll taxes.	33,704,975	31,182,864	2,522,111	
<b>11</b> Fees for services (non-employees):				
<b>a</b> Management.	51,245,049	48,120,348	3,124,701	
<b>b</b> Legal.	523,754		523,754	
<b>c</b> Accounting.	496,969		496,969	
<b>d</b> Lobbying.	438,450		438,450	
<b>e</b> Professional fundraising services. See Part IV, line 17.				
<b>f</b> Investment management fees.				
<b>g</b> Other (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O).	161,506,575	151,236,989	10,269,586	
<b>12</b> Advertising and promotion.	286,875	282,324	4,551	
<b>13</b> Office expenses.	304,458,293	300,032,846	4,425,447	
<b>14</b> Information technology.	70,815,442	70,153,573	661,869	
<b>15</b> Royalties.				
<b>16</b> Occupancy.	24,584,498	12,392,403	12,192,095	
<b>17</b> Travel.	1,601,570	1,380,337	221,233	
<b>18</b> Payments of travel or entertainment expenses for any federal, state, or local public officials.				
<b>19</b> Conferences, conventions, and meetings.	1,335,951	1,158,056	177,895	
<b>20</b> Interest.	10,306,825	10,306,825		
<b>21</b> Payments to affiliates.				
<b>22</b> Depreciation, depletion, and amortization.	57,083,622	49,327,734	7,755,888	
<b>23</b> Insurance.	8,318,581	7,166,601	1,151,980	
<b>24</b> Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.):				
<b>a</b>				
<b>b</b>				
<b>c</b>				
<b>d</b>				
<b>e</b> All other expenses.				
<b>25</b> Total functional expenses. Add lines 1 through 24e.	1,270,186,504	1,186,927,884	83,258,620	0
<b>26</b> Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720)				

**Part X Balance Sheet**Check if Schedule O contains a response or note to any line in this Part IX ☐

				(A) Beginning of year		(B) End of year	
<b>Assets</b>	<b>1</b>	Cash—non-interest-bearing . . . . .			<b>1</b>		
	<b>2</b>	Savings and temporary cash investments . . . . .		79,823,279	<b>2</b>	67,907,527	
	<b>3</b>	Pledges and grants receivable, net . . . . .			<b>3</b>		
	<b>4</b>	Accounts receivable, net . . . . .		207,602,809	<b>4</b>	218,985,401	
	<b>5</b>	Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L . . . . .			<b>5</b>		
	<b>6</b>	Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instructions). Complete Part II of Schedule L . . . . .			<b>6</b>		
	<b>7</b>	Notes and loans receivable, net . . . . .			<b>7</b>		
	<b>8</b>	Inventories for sale or use . . . . .		26,610,122	<b>8</b>	28,854,844	
	<b>9</b>	Prepaid expenses and deferred charges . . . . .		23,322,726	<b>9</b>	19,043,483	
	<b>10a</b>	Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D.	<b>10a</b>	1,542,477,603			
	<b>b</b>	Less: accumulated depreciation	<b>10b</b>	983,523,217	565,605,841	<b>10c</b>	558,954,386
	<b>11</b>	Investments—publicly traded securities . . . . .		340,292,738	<b>11</b>	388,878,451	
	<b>12</b>	Investments—other securities. See Part IV, line 11 . . . . .		99,699,981	<b>12</b>	107,518,858	
	<b>13</b>	Investments—program-related. See Part IV, line 11 . . . . .			<b>13</b>		
	<b>14</b>	Intangible assets . . . . .		1,551,527	<b>14</b>	1,551,927	
	<b>15</b>	Other assets. See Part IV, line 11 . . . . .		18,299,518	<b>15</b>	17,874,827	
<b>16</b>	<b>Total assets.</b> Add lines 1 through 15 (must equal line 34) . . . . .		1,362,808,541	<b>16</b>	1,409,569,704		
<b>Liabilities</b>	<b>17</b>	Accounts payable and accrued expenses . . . . .		128,721,824	<b>17</b>	133,587,353	
	<b>18</b>	Grants payable . . . . .			<b>18</b>		
	<b>19</b>	Deferred revenue . . . . .		2,878,331	<b>19</b>	613,927	
	<b>20</b>	Tax-exempt bond liabilities . . . . .		370,978,538	<b>20</b>	359,303,408	
	<b>21</b>	Escrow or custodial account liability. Complete Part IV of Schedule D . . . . .			<b>21</b>		
	<b>22</b>	Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L . . . . .			<b>22</b>		
	<b>23</b>	Secured mortgages and notes payable to unrelated third parties . . . . .		16,833,400	<b>23</b>	14,149,856	
	<b>24</b>	Unsecured notes and loans payable to unrelated third parties . . . . .			<b>24</b>		
	<b>25</b>	Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17 - 24). Complete Part X of Schedule D . . . . .		15,712,555	<b>25</b>	62,877,872	
	<b>26</b>	<b>Total liabilities.</b> Add lines 17 through 25 . . . . .		535,124,648	<b>26</b>	570,532,416	
<b>Net Assets or Fund Balances</b>	<b>Organizations that follow SFAS 117 (ASC 958), check here <input checked="" type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34.</b>						
	<b>27</b>	Unrestricted net assets . . . . .		810,654,158	<b>27</b>	822,485,940	
	<b>28</b>	Temporarily restricted net assets . . . . .		11,327,344	<b>28</b>	10,989,184	
	<b>29</b>	Permanently restricted net assets . . . . .		5,702,391	<b>29</b>	5,562,164	
	<b>Organizations that do not follow SFAS 117 (ASC 958), check here <input type="checkbox"/> and complete lines 30 through 34.</b>						
	<b>30</b>	Capital stock or trust principal, or current funds . . . . .			<b>30</b>		
	<b>31</b>	Paid-in or capital surplus, or land, building or equipment fund . . . . .			<b>31</b>		
	<b>32</b>	Retained earnings, endowment, accumulated income, or other funds . . . . .			<b>32</b>		
<b>33</b>	<b>Total net assets or fund balances</b> . . . . .		827,683,893	<b>33</b>	839,037,288		
<b>34</b>	<b>Total liabilities and net assets/fund balances</b> . . . . .		1,362,808,541	<b>34</b>	1,409,569,704		

**Part XI Reconciliation of Net Assets**Check if Schedule O contains a response or note to any line in this Part XI ☒

<b>1</b>	Total revenue (must equal Part VIII, column (A), line 12)	<b>1</b>	1,389,295,156
<b>2</b>	Total expenses (must equal Part IX, column (A), line 25)	<b>2</b>	1,270,186,504
<b>3</b>	Revenue less expenses Subtract line 2 from line 1	<b>3</b>	119,108,652
<b>4</b>	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	<b>4</b>	827,683,893
<b>5</b>	Net unrealized gains (losses) on investments	<b>5</b>	8,015,305
<b>6</b>	Donated services and use of facilities	<b>6</b>	
<b>7</b>	Investment expenses	<b>7</b>	
<b>8</b>	Prior period adjustments	<b>8</b>	
<b>9</b>	Other changes in net assets or fund balances (explain in Schedule O)	<b>9</b>	-115,770,562
<b>10</b>	Net assets or fund balances at end of year Combine lines 3 through 9 (must equal Part X, line 33, column (B))	<b>10</b>	839,037,288

**Part XII Financial Statements and Reporting**Check if Schedule O contains a response or note to any line in this Part XII ☐

	Yes	No
<b>1</b> Accounting method used to prepare the Form 990 <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other _____ If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O		
<b>2a</b> Were the organization's financial statements compiled or reviewed by an independent accountant? If 'Yes,' check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both <input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis		No
<b>b</b> Were the organization's financial statements audited by an independent accountant? If 'Yes,' check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both <input type="checkbox"/> Separate basis <input checked="" type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis	Yes	
<b>c</b> If "Yes," to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O	Yes	
<b>3a</b> As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?		No
<b>b</b> If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits		

# Additional Data

**Software ID:**

**Software Version:**

**EIN:** 04-2790311

**Name:** Baystate Medical Center Inc

Form 990 (2018)

**Form 990, Part III, Line 4a:**

Inpatient healthcare services - Providing inpatient community-based medicine and tertiary care to the surrounding region. Services are available to individuals regardless of their ability to pay. During FY19, Baystate Medical Center, Inc. provided 218,747 patient days of inpatient services, with 42,592 discharges.

## **Form 990, Part III, Line 4b:**

Outpatient healthcare services - Providing outpatient clinical services to the surrounding region. Services are available to individuals regardless of their ability to pay. During FY19, Baystate Medical Center, Inc. had 480,781 outpatient visits.

---

## **Form 990, Part III, Line 4c:**

Emergency department services - Providing emergency department services to the surrounding region. Services are available to individuals regardless of their ability to pay. During FY19, Baystate Medical Center, Inc. had 113,391 emergency department visits.

---

Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors										
(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W- 2/1099-MISC)	(E) Reportable compensation from related organizations (W- 2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
John F Maybury ..... Chair (as of 1/1/19)	1 00 ..... 2 00	X		X				0	0	0
Robert J Bacon ..... Vice Chair (as of 1/1/19)	1 00 ..... 2 00	X		X				0	0	0
Adrian J Levsky ..... Trustee	1 00 ..... 1 00	X						0	0	0
Anne M Paradis ..... Trustee/ Chair (Through 12/31/18)	1 00 ..... 2 00	X		X				0	0	0
Claudia R Coplein DO ..... Trustee	1 00 ..... 1 00	X						0	0	0
Colleen W Holmes ..... Trustee	1 00 ..... 1 00	X						0	0	0
Edward J Noonan ..... Trustee	1 00 ..... 1 00	X						0	0	0
Gregory L Braden MD ..... Trustee	1 00 ..... 1 00	X						0	0	0
Harriet A DeVerry ..... Trustee	1 00 ..... 1 00	X						0	0	0
Hector Toledo ..... Trustee	1 00 ..... 1 00	X						0	0	0



Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors										
(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W- 2/1099-MISC)	(E) Reportable compensation from related organizations (W- 2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
Holly Mason MD ..... Trustee (as of 1/1/19)/ Surgeon, Oncology	10 00 ..... 40 00	X						302,178	0	47,332
Irene Rodriguez Martin ..... Trustee	1 00 ..... 1 00	X						0	0	0
James R Phaneuf ..... Trustee	1 00 ..... 1 00	X						0	0	0
John A Egelhofer MD ..... Trustee	1 00 ..... 1 00	X						0	0	0
Kathleen B Scoble ..... Trustee	1 00 ..... 1 00	X						0	0	0
Kevin P Moriarty MD ..... Trustee/Chief Ped Surg	1 00 ..... 49 00	X						702,493	0	31,882
Maria P Goncalves ..... Trustee	1 00 ..... 1 00	X						0	0	0
Mark A Keroack MD ..... Trustee/ President & CEO, BH	1 00 ..... 49 00	X						0	2,027,506	40,042
Michael P Albert MD ..... Trustee (thru 12/31/18)/ Med Dir OR	49 00 ..... 1 00	X						337,696	0	61,747
Melissa D Cragg ..... Trustee (as of 1/1/19)	1 00 ..... 1 00	X						0	0	0

Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors										
(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W- 2/1099-MISC)	(E) Reportable compensation from related organizations (W- 2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
Paul R Murphy ..... Trustee	1 00 .....	X						0	0	0
Robert L Pura PhD ..... Trustee (through 4/9/19)	1 00 .....	X						0	0	0
Timothy F Farrell ..... Trustee	1 00 .....	X						0	0	0
William R Webber ..... Trustee	1 00 .....	X						0	0	0
Nancy Shendell-Falik ..... President/ SVP Hospital Ops	30 00 ..... 20 00			X				0	1,719,444	45,207
Dennis W Chalke ..... Treasurer	1 00 ..... 49 00			X				0	947,658	90,444
Kristin R Delaney ..... Clerk	1 00 ..... 49 00			X				0	145,051	37,639
Nancy Remillard ..... Assistant Clerk (as of 11/13/18)	1 00 ..... 39 00			X				0	51,003	8,248
Christine Klucznik ..... VP/ CNO	50 00 ..... 0 00				X			0	374,756	22,724
Tejas Gandhi ..... VP/ COO	40 00 ..... 10 00				X			0	515,946	42,500

**Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W- 2/1099- MISC)	(E) Reportable compensation from related organizations (W- 2/1099- MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
Peter Friedmann MD ..... Assoc Dean Chief Res Officer	50 00 ..... 0 00					X		420,354	0	42,015
Amy Gottlieb MD ..... Assoc Dean Chief Fac Devel	50 00 ..... 0 00					X		361,679	0	20,901
Peter Lindenauer MD ..... Asst Dean Population Health	50 00 ..... 0 00					X		358,642	0	51,234
Deborah A Provost ..... VP CAO CNO BFMC / CRO BH	50 00 ..... 0 00					X		316,024	0	87,756
Jasmine J Paadam MD ..... CIS Physician Leader	50 00 ..... 0 00					X		313,744	0	16,827

**SCHEDULE A**  
**(Form 990 or 990-EZ)**

Department of the Treasury  
Internal Revenue Service

**Public Charity Status and Public Support**  
Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.  
▶ Attach to Form 990 or Form 990-EZ.  
▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No 1545-0047  
**2018**  
**Open to Public Inspection**

**Name of the organization**  
Baystate Medical Center Inc

**Employer identification number**  
04-2790311

**Part I** Reason for Public Charity Status (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is (For lines 1 through 12, check only one box )

- 1

☐

A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**
- 2

☐

A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E (Form 990 or 990-EZ) )
- 3

☒

A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**
- 4

☐

A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state \_\_\_\_\_
- 5

☐

An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II )
- 6

☐

A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**
- 7

☐

An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II )
- 8

☐

A community trust described in **section 170(b)(1)(A)(vi)** (Complete Part II )
- 9

☐

An agricultural research organization described in **170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land grant college of agriculture See instructions Enter the name, city, and state of the college or university \_\_\_\_\_
- 10

☐

An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions—subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975 See **section 509(a)(2).** (Complete Part III )
- 11

☐

An organization organized and operated exclusively to test for public safety See **section 509(a)(4).**
- 12

☐

An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2).** See **section 509(a)(3).** Check the box in lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g
- a

☐

**Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization **You must complete Part IV, Sections A and B.**
- b

☐

**Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s) **You must complete Part IV, Sections A and C.**
- c

☐

**Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions) **You must complete Part IV, Sections A, D, and E.**
- d

☐

**Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions) **You must complete Part IV, Sections A and D, and Part V.**
- e

☐

Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization
- f

Enter the number of supported organizations \_\_\_\_\_
- g

Provide the following information about the supported organization(s)

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1- 10 above (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			Yes	No		
<b>Total</b>						

Part II

Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv), 170(b)(1)(A)(vi), and 170(b)(1)(A)(ix)

(Complete only if you checked the box on line 5, 7, 8, or 9 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

Section A. Public Support							
	Calendar year (or fiscal year beginning in) ►	(a) 2014	(b) 2015	(c) 2016	(d) 2017	(e) 2018	(f) Total
1	Gifts, grants, contributions, and membership fees received (Do not include any "unusual grant ")						
2	Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3	The value of services or facilities furnished by a governmental unit to the organization without charge						
4	<b>Total.</b> Add lines 1 through 3						
5	The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						
6	<b>Public support.</b> Subtract line 5 from line 4						

Section B. Total Support							
Calendar year (or fiscal year beginning in) ►		(a)2014	(b)2015	(c)2016	(d)2017	(e)2018	(f)Total
7	Amounts from line 4						
8	Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
9	Net income from unrelated business activities, whether or not the business is regularly carried on						
10	Other income Do not include gain or loss from the sale of capital assets (Explain in Part VI )						
11	<b>Total support.</b> Add lines 7 through 10						
12	Gross receipts from related activities, etc (see instructions)					<b>12</b>	
13	<b>First five years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here</b> . . . . . ► <input type="checkbox"/>						

Section C. Computation of Public Support Percentage		
14	Public support percentage for 2018 (line 6, column (f) divided by line 11, column (f))	14
15	Public support percentage for 2017 Schedule A, Part II, line 14	15
16a	<b>33 1/3% support test—2018.</b> If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization <span>▶ <input type="checkbox"/></span>	
b	<b>33 1/3% support test—2017.</b> If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization <span>▶ <input type="checkbox"/></span>	
17a	<b>10%-facts-and-circumstances test—2018.</b> If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and <b>stop here.</b> Explain in Part VI how the organization meets the "facts-and-circumstances" test The organization qualifies as a publicly supported organization <span>▶ <input type="checkbox"/></span>	
b	<b>10%-facts-and-circumstances test—2017.</b> If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and <b>stop here.</b> Explain in Part VI how the organization meets the "facts-and-circumstances" test The organization qualifies as a publicly supported organization <span>▶ <input type="checkbox"/></span>	
18	<b>Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions <span>▶ <input type="checkbox"/></span>	

**Part III Support Schedule for Organizations Described in Section 509(a)(2)**

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ►	(a) 2014	(b) 2015	(c) 2016	(d) 2017	(e) 2018	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants.")						
<b>2</b> Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
<b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513						
<b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
<b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge						
<b>6 Total.</b> Add lines 1 through 5						
<b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons						
<b>b</b> Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
<b>c</b> Add lines 7a and 7b						
<b>8 Public support.</b> (Subtract line 7c from line 6.)						

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ►	(a) 2014	(b) 2015	(c) 2016	(d) 2017	(e) 2018	(f) Total
<b>9</b> Amounts from line 6						
<b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
<b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
<b>c</b> Add lines 10a and 10b						
<b>11</b> Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
<b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
<b>13 Total support.</b> (Add lines 9, 10c, 11, and 12.)						

**14 First five years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** ► ☐

**Section C. Computation of Public Support Percentage**

<b>15</b> Public support percentage for 2018 (line 8, column (f) divided by line 13, column (f))	<b>15</b>	
<b>16</b> Public support percentage from 2017 Schedule A, Part III, line 15	<b>16</b>	

**Section D. Computation of Investment Income Percentage**

<b>17</b> Investment income percentage for <b>2018</b> (line 10c, column (f) divided by line 13, column (f))	<b>17</b>	
<b>18</b> Investment income percentage from <b>2017</b> Schedule A, Part III, line 17	<b>18</b>	

**19a 33 1/3% support tests—2018.** If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ► ☐

**b 33 1/3% support tests—2017.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3% and line 18 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ► ☐

**20 Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ► ☐

**Part IV Supporting Organizations**

(Complete only if you checked a box on line 12 of Part I. If you checked 12a of Part I, complete Sections A and B. If you checked 12b of Part I, complete Sections A and C. If you checked 12c of Part I, complete Sections A, D, and E. If you checked 12d of Part I, complete Sections A and D, and complete Part V.)

**Section A. All Supporting Organizations**

	Yes	No
<b>1</b> Are all of the organization's supported organizations listed by name in the organization's governing documents? <i>If "No," describe in <b>Part VI</b> how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.</i>	<b>1</b>	
<b>2</b> Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? <i>If "Yes," explain in <b>Part VI</b> how the organization determined that the supported organization was described in section 509(a)(1) or (2).</i>	<b>2</b>	
<b>3a</b> Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? <i>If "Yes," answer (b) and (c) below.</i>	<b>3a</b>	
<b>b</b> Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? <i>If "Yes," describe in <b>Part VI</b> when and how the organization made the determination.</i>	<b>3b</b>	
<b>c</b> Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? <i>If "Yes," explain in <b>Part VI</b> what controls the organization put in place to ensure such use.</i>	<b>3c</b>	
<b>4a</b> Was any supported organization not organized in the United States ("foreign supported organization")? <i>If "Yes" and if you checked 12a or 12b in Part I, answer (b) and (c) below.</i>	<b>4a</b>	
<b>b</b> Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? <i>If "Yes," describe in <b>Part VI</b> how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.</i>	<b>4b</b>	
<b>c</b> Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? <i>If "Yes," explain in <b>Part VI</b> what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.</i>	<b>4c</b>	
<b>5a</b> Did the organization add, substitute, or remove any supported organizations during the tax year? <i>If "Yes," answer (b) and (c) below (if applicable). Also, provide detail in <b>Part VI</b>, including (i) the names and EIN numbers of the supported organizations added, substituted, or removed, (ii) the reasons for each such action, (iii) the authority under the organization's organizing document authorizing such action, and (iv) how the action was accomplished (such as by amendment to the organizing document).</i>	<b>5a</b>	
<b>b</b> <b>Type I or Type II only.</b> Was any added or substituted supported organization part of a class already designated in the organization's organizing document?	<b>5b</b>	
<b>c</b> <b>Substitutions only.</b> Was the substitution the result of an event beyond the organization's control?	<b>5c</b>	
<b>6</b> Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? <i>If "Yes," provide detail in <b>Part VI</b>.</i>	<b>6</b>	
<b>7</b> Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? <i>If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).</i>	<b>7</b>	
<b>8</b> Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? <i>If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).</i>	<b>8</b>	
<b>9a</b> Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? <i>If "Yes," provide detail in <b>Part VI</b>.</i>	<b>9a</b>	
<b>b</b> Did one or more disqualified persons (as defined in line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? <i>If "Yes," provide detail in <b>Part VI</b>.</i>	<b>9b</b>	
<b>c</b> Did a disqualified person (as defined in line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? <i>If "Yes," provide detail in <b>Part VI</b>.</i>	<b>9c</b>	
<b>10a</b> Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? <i>If "Yes," answer line 10b below.</i>	<b>10a</b>	
<b>b</b> Did the organization have any excess business holdings in the tax year? <i>(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)</i>	<b>10b</b>	

Part IV

Supporting Organizations (continued)

	Yes	No
11 Has the organization accepted a gift or contribution from any of the following persons?		
a A person who directly or indirectly controls, either alone or together with persons described in (b) and (c) below, the governing body of a supported organization?		
11a		
b A family member of a person described in (a) above?		
11b		
c A 35% controlled entity of a person described in (a) or (b) above? If "Yes" to a, b, or c, provide detail in Part VI		
11c		

Section B. Type I Supporting Organizations

	Yes	No
1 Did the directors, trustees, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's directors or trustees at all times during the tax year? If "No," describe in Part VI how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove directors or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year		
1		
2 Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? If "Yes," explain in Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised or controlled the supporting organization		
2		

Section C. Type II Supporting Organizations

	Yes	No
1 Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? If "No," describe in Part VI how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s)		
1		

Section D. All Type III Supporting Organizations

	Yes	No
1 Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?		
1		
2 Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization (s) or (ii) serving on the governing body of a supported organization? If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s)		
2		
3 By reason of the relationship described in (2), did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? If "Yes," describe in Part VI the role the organization's supported organizations played in this regard		
3		

Section E. Type III Functionally-Integrated Supporting Organizations

1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions)		
a <input type="checkbox"/> The organization satisfied the Activities Test. Complete line 2 below		
b <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete line 3 below		
c <input type="checkbox"/> The organization supported a governmental entity. Describe in Part VI how you supported a government entity (see instructions)		
2 Activities Test. Answer (a) and (b) below.	Yes	No
a Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? If "Yes," then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities		
2a		
b Did the activities described in (a) constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? If "Yes," explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement		
2b		
3 Parent of Supported Organizations. Answer (a) and (b) below.		
a Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? Provide details in Part VI.		
3a		
b Did the organization exercise a substantial degree of direction over the policies, programs and activities of each of its supported organizations? If "Yes," describe in Part VI the role played by the organization in this regard		
3b		



<b>Part V</b> <b>Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations</b>			
<div>1</div> <div><input type="checkbox"/></div> <div>Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 (explain in Part VI). <b>See instructions.</b> All other Type III non-functionally integrated supporting organizations must complete Sections A through E.</div>			
<b>Section A - Adjusted Net Income</b>		(A) Prior Year	(B) Current Year (optional)
1	Net short-term capital gain	1	
2	Recoveries of prior-year distributions	2	
3	Other gross income (see instructions)	3	
4	Add lines 1 through 3	4	
5	Depreciation and depletion	5	
6	Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6	
7	Other expenses (see instructions)	7	
8	<b>Adjusted Net Income</b> (subtract lines 5, 6 and 7 from line 4)	8	
<b>Section B - Minimum Asset Amount</b>		(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year)	1	
a	Average monthly value of securities	1a	
b	Average monthly cash balances	1b	
c	Fair market value of other non-exempt-use assets	1c	
d	<b>Total</b> (add lines 1a, 1b, and 1c)	1d	
e	<b>Discount</b> claimed for blockage or other factors (explain in detail in Part VI)		
2	Acquisition indebtedness applicable to non-exempt use assets	2	
3	Subtract line 2 from line 1d	3	
4	Cash deemed held for exempt use. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	
5	Net value of non-exempt-use assets (subtract line 4 from line 3)	5	
6	Multiply line 5 by .035	6	
7	Recoveries of prior-year distributions	7	
8	<b>Minimum Asset Amount</b> (add line 7 to line 6)	8	
<b>Section C - Distributable Amount</b>			Current Year
1	Adjusted net income for prior year (from Section A, line 8, Column A)	1	
2	Enter 85% of line 1	2	
3	Minimum asset amount for prior year (from Section B, line 8, Column A)	3	
4	Enter greater of line 2 or line 3	4	
5	Income tax imposed in prior year	5	
6	<b>Distributable Amount.</b> Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions)	6	
7	<div><input type="checkbox"/></div> Check here if the current year is the organization's first as a non-functionally-integrated Type III supporting organization (see instructions)		

Part V

Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations (continued)

Section D - Distributions	Current Year
1 Amounts paid to supported organizations to accomplish exempt purposes	
2 Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	
3 Administrative expenses paid to accomplish exempt purposes of supported organizations	
4 Amounts paid to acquire exempt-use assets	
5 Qualified set-aside amounts (prior IRS approval required)	
6 Other distributions (describe in Part VI) See instructions	
7 Total annual distributions. Add lines 1 through 6	
8 Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI) See instructions	
9 Distributable amount for 2018 from Section C, line 6	
10 Line 8 amount divided by Line 9 amount	

Section E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2018	(iii) Distributable Amount for 2018
1 Distributable amount for 2018 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2018 (reasonable cause required-- explain in Part VI) See instructions			
3 Excess distributions carryover, if any, to 2018			
a From 2013. . . . .			
b From 2014. . . . .			
c From 2015. . . . .			
d From 2016. . . . .			
e From 2017. . . . .			
f Total of lines 3a through e			
g Applied to underdistributions of prior years			
h Applied to 2018 distributable amount			
i Carryover from 2013 not applied (see instructions)			
j Remainder Subtract lines 3g, 3h, and 3i from 3f			
4 Distributions for 2018 from Section D, line 7 \$			
a Applied to underdistributions of prior years			
b Applied to 2018 distributable amount			
c Remainder Subtract lines 4a and 4b from 4			
5 Remaining underdistributions for years prior to 2018, if any Subtract lines 3g and 4a from line 2 If the amount is greater than zero, explain in Part VI See instructions			
6 Remaining underdistributions for 2018 Subtract lines 3h and 4b from line 1 If the amount is greater than zero, explain in Part VI See instructions			
7 Excess distributions carryover to 2019. Add lines 3j and 4c			
8 Breakdown of line 7			
a Excess from 2014. . . . .			
b Excess from 2015. . . . .			
c Excess from 2016. . . . .			
d Excess from 2017. . . . .			
e Excess from 2018. . . . .			

Additional Data

Software ID:  
Software Version:  
EIN: 04-2790311  
Name: Baystate Medical Center Inc

Part VI

**Supplemental Information.** Provide the explanations required by Part II, line 10, Part II, line 17a or 17b, Part III, line 12, Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c, Part IV, Section B, lines 1 and 2, Part IV, Section C, line 1, Part IV, Section D, lines 2 and 3, Part IV, Section E, lines 1c, 2a, 2b, 3a and 3b, Part V, line 1, Part V, Section B, line 1e, Part V Section D, lines 5, 6, and 8, and Part V, Section E, lines 2, 5, and 6 Also complete this part for any additional information (See instructions)

Facts And Circumstances Test

**SCHEDULE C**  
**(Form 990 or 990-EZ)**

Department of the Treasury  
Internal Revenue Service

**Political Campaign and Lobbying Activities**

**For Organizations Exempt From Income Tax Under section 501(c) and section 527**

▶ **Complete if the organization is described below.** ▶ **Attach to Form 990 or Form 990-EZ.**  
▶ **Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.**

OMB No 1545-0047

**2018**

**Open to Public Inspection**

**If the organization answered "Yes" on Form 990, Part IV, Line 3, or Form 990-EZ, Part V, line 46 (Political Campaign Activities), then**

- Section 501(c)(3) organizations Complete Parts I-A and B Do not complete Part I-C
- Section 501(c) (other than section 501(c)(3)) organizations Complete Parts I-A and C below Do not complete Part I-B
- Section 527 organizations Complete Part I-A only

**If the organization answered "Yes" on Form 990, Part IV, Line 4, or Form 990-EZ, Part VI, line 47 (Lobbying Activities), then**

- Section 501(c)(3) organizations that have filed Form 5768 (election under section 501(h)) Complete Part II-A Do not complete Part II-B
- Section 501(c)(3) organizations that have NOT filed Form 5768 (election under section 501(h)) Complete Part II-B Do not complete Part II-A

**If the organization answered "Yes" on Form 990, Part IV, Line 5 (Proxy Tax) (see separate instructions) or Form 990-EZ, Part V, line 35c (Proxy Tax) (see separate instructions), then**

- Section 501(c)(4), (5), or (6) organizations Complete Part III

Name of the organization Baystate Medical Center Inc	<b>Employer identification number</b> 04-2790311
---	---

**Part I-A Complete if the organization is exempt under section 501(c) or is a section 527 organization.**

- 1 Provide a description of the organization's direct and indirect political campaign activities in Part IV (see instructions for definition of "political campaign activities")
- 2 Political campaign activity expenditures (see instructions) ▶ \$
- 3 Volunteer hours for political campaign activities (see instructions) ▶

**Part I-B Complete if the organization is exempt under section 501(c)(3).**

- 1 Enter the amount of any excise tax incurred by the organization under section 4955 ▶ \$
- 2 Enter the amount of any excise tax incurred by organization managers under section 4955 ▶ \$
- 3 If the organization incurred a section 4955 tax, did it file Form 4720 for this year? ☐ Yes ☐ No
- 4a Was a correction made? ☐ Yes ☐ No
- b If "Yes," describe in Part IV

**Part I-C Complete if the organization is exempt under section 501(c), except section 501(c)(3).**

- 1 Enter the amount directly expended by the filing organization for section 527 exempt function activities ▶ \$
- 2 Enter the amount of the filing organization's funds contributed to other organizations for section 527 exempt function activities ▶ \$
- 3 Total exempt function expenditures Add lines 1 and 2 Enter here and on Form 1120-POL, line 17b ▶ \$
- 4 Did the filing organization file **Form 1120-POL** for this year? ☐ Yes ☐ No
- 5 Enter the names, addresses and employer identification number (EIN) of all section 527 political organizations to which the filing organization made payments For each organization listed, enter the amount paid from the filing organization's funds Also enter the amount of political contributions received that were promptly and directly delivered to a separate political organization, such as a separate segregated fund or a political action committee (PAC) If additional space is needed, provide information in Part IV

(a) Name	(b) Address	(c) EIN	(d) Amount paid from filing organization's funds If none, enter -0-	(e) Amount of political contributions received and promptly and directly delivered to a separate political organization If none, enter -0-
1				
2				
3				
4				
5				
6				

**Part II-A Complete if the organization is exempt under section 501(c)(3) and filed Form 5768 (election under section 501(h)).**

**A** Check ☐ if the filing organization belongs to an affiliated group (and list in Part IV each affiliated group member's name, address, EIN, expenses, and share of excess lobbying expenditures)

**B** Check ☐ if the filing organization checked box A and "limited control" provisions apply

**Limits on Lobbying Expenditures**  
(The term "expenditures" means amounts paid or incurred.)**(a)** Filing  
organization's  
totals**(b)** Affiliated  
group totals

**1a** Total lobbying expenditures to influence public opinion (grass roots lobbying)

**b** Total lobbying expenditures to influence a legislative body (direct lobbying)

**c** Total lobbying expenditures (add lines 1a and 1b)

**d** Other exempt purpose expenditures

**e** Total exempt purpose expenditures (add lines 1c and 1d)

**f** Lobbying nontaxable amount Enter the amount from the following table in both columns

If the amount on line 1e, column (a) or (b) is:	The lobbying nontaxable amount is:
Not over \$500,000	20% of the amount on line 1e
Over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000
Over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000
Over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000
Over \$17,000,000	\$1,000,000

**g** Grassroots nontaxable amount (enter 25% of line 1f)

**h** Subtract line 1g from line 1a If zero or less, enter -0-

**i** Subtract line 1f from line 1c If zero or less, enter -0-

**j** If there is an amount other than zero on either line 1h or line 1i, did the organization file Form 4720 reporting section 4911 tax for this year?

☐ **Yes** ☐ **No****4-Year Averaging Period Under section 501(h)**

(Some organizations that made a section 501(h) election do not have to complete all of the five columns below. See the separate instructions for lines 2a through 2f.)

**Lobbying Expenditures During 4-Year Averaging Period**

Calendar year (or fiscal year beginning in)	(a) 2015	(b) 2016	(c) 2017	(d) 2018	(e) Total
<b>2a</b> Lobbying nontaxable amount					
<b>b</b> Lobbying ceiling amount (150% of line 2a, column(e))					
<b>c</b> Total lobbying expenditures					
<b>d</b> Grassroots nontaxable amount					
<b>e</b> Grassroots ceiling amount (150% of line 2d, column (e))					
<b>f</b> Grassroots lobbying expenditures					

**Part II-B Complete if the organization is exempt under section 501(c)(3) and has NOT filed Form 5768 (election under section 501(h)).**

For each "Yes" response on lines 1a through 1i below, provide in Part IV a detailed description of the lobbying activity

		(a)		(b)
		Yes	No	Amount
<b>1</b>	During the year, did the filing organization attempt to influence foreign, national, state or local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of			
<b>a</b>	Volunteers?		No	
<b>b</b>	Paid staff or management (include compensation in expenses reported on lines 1c through 1i)?		No	
<b>c</b>	Media advertisements?		No	
<b>d</b>	Mailings to members, legislators, or the public?		No	
<b>e</b>	Publications, or published or broadcast statements?		No	
<b>f</b>	Grants to other organizations for lobbying purposes?		No	
<b>g</b>	Direct contact with legislators, their staffs, government officials, or a legislative body?		No	
<b>h</b>	Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means?		No	
<b>i</b>	Other activities?	Yes		438,450
<b>j</b>	Total. Add lines 1c through 1i			438,450
<b>2a</b>	Did the activities in line 1 cause the organization to be not described in section 501(c)(3)?		No	
<b>b</b>	If "Yes," enter the amount of any tax incurred under section 4912			
<b>c</b>	If "Yes," enter the amount of any tax incurred by organization managers under section 4912			
<b>d</b>	If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?			

**Part III-A Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6).**

		Yes	No
<b>1</b>	Were substantially all (90% or more) dues received nondeductible by members?	<b>1</b>	
<b>2</b>	Did the organization make only in-house lobbying expenditures of \$2,000 or less?	<b>2</b>	
<b>3</b>	Did the organization agree to carry over lobbying and political expenditures from the prior year?	<b>3</b>	

**Part III-B Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6) and if either (a) BOTH Part III-A, lines 1 and 2, are answered "No" OR (b) Part III-A, line 3, is answered "Yes."**

<b>1</b>	Dues, assessments and similar amounts from members	<b>1</b>	
<b>2</b>	Section 162(e) nondeductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid).	<b>2a</b>	
<b>a</b>	Current year	<b>2b</b>	
<b>b</b>	Carryover from last year	<b>2c</b>	
<b>c</b>	Total	<b>3</b>	
<b>3</b>	Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues	<b>4</b>	
<b>4</b>	If notices were sent and the amount on line 2c exceeds the amount on line 3, what portion of the excess does the organization agree to carryover to the reasonable estimate of nondeductible lobbying and political expenditure next year?	<b>5</b>	
<b>5</b>	Taxable amount of lobbying and political expenditures (see instructions)		

**Part IV Supplemental Information**

Provide the descriptions required for Part I-A, line 1, Part I-B, line 4, Part I-C, line 5, Part II-A (affiliated group list), Part II-A, lines 1 and 2 (see instructions), and Part II-B, line 1. Also, complete this part for any additional information.

Return Reference	Explanation
Part II-B, Line 1-i	Baystate Medical Center, Inc. pays membership dues to the Massachusetts Hospital Association (MHA), the American Hospital Association (AHA) and the National Association of Urban Hospitals. These organizations have advised us that portions of these dues are used for lobbying purposes for various healthcare matters at the state level. The portion of dues listed as lobbying expenses for the year ending September 30, 2019 is \$438,450.

SCHEDULE D  
(Form 990)

Department of the Treasury  
Internal Revenue Service

Supplemental Financial Statements

► Complete if the organization answered "Yes," on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.  
► Attach to Form 990.  
► Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No 1545-0047

2018

Open to Public Inspection

Name of the organization  
Baystate Medical Center Inc

Employer identification number  
04-2790311

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.  
Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year		
2 Aggregate value of contributions to (during year)		
3 Aggregate value of grants from (during year)		
4 Aggregate value at end of year		

5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control?

☐ Yes ☐ No

6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit?

☐ Yes ☐ No

Part II Conservation Easements. Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply)

☐ Preservation of land for public use (e g , recreation or education)

☐ Preservation of an historically important land area

☐ Protection of natural habitat

☐ Preservation of a certified historic structure

☐ Preservation of open space

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year

	Held at the End of the Year
a Total number of conservation easements	2a
b Total acreage restricted by conservation easements	2b
c Number of conservation easements on a certified historic structure included in (a)	2c
d Number of conservation easements included in (c) acquired after 7/25/06, and not on a historic structure listed in the National Register	2d

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year ►

4 Number of states where property subject to conservation easement is located ►

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds?

☐ Yes ☐ No

6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ►

7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ► \$

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)?

☐ Yes ☐ No

9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.  
Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

1a If the organization elected, as permitted under SFAS 116 (ASC 958), not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIII, the text of the footnote to its financial statements that describes these items

b If the organization elected, as permitted under SFAS 116 (ASC 958), to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items

(i) Revenue included on Form 990, Part VIII, line 1

► \$

(ii) Assets included in Form 990, Part X

► \$

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 (ASC 958) relating to these items

a Revenue included on Form 990, Part VIII, line 1

► \$

b Assets included in Form 990, Part X

► \$

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets** (continued)

**3** Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply)

- a** ☐ Public exhibition
- b** ☐ Scholarly research
- c** ☐ Preservation for future generations
- d** ☐ Loan or exchange programs
- e** ☐ Other

**4** Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII

**5** During the year, did the organization solicit or receive donations of art, historical treasures or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? ☐ Yes ☐ No

**Part IV Escrow and Custodial Arrangements.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

**1a** Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? ☐ Yes ☐ No

**b** If "Yes," explain the arrangement in Part XIII and complete the following table

**c** Beginning balance

**d** Additions during the year

**e** Distributions during the year

**f** Ending balance

	Amount
<b>1c</b>	
<b>1d</b>	
<b>1e</b>	
<b>1f</b>	

**2a** Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? . . . ☐ Yes ☐ No

**b** If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided in Part XIII . . . . ☐

**Part V Endowment Funds.** Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
<b>1a</b> Beginning of year balance . . . . .					
<b>b</b> Contributions . . . . .					
<b>c</b> Net investment earnings, gains, and losses					
<b>d</b> Grants or scholarships . . . . .					
<b>e</b> Other expenditures for facilities and programs . . . . .					
<b>f</b> Administrative expenses . . . . .					
<b>g</b> End of year balance . . . . .					

**2** Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as

**a** Board designated or quasi-endowment ▶

**b** Permanent endowment ▶

**c** Temporarily restricted endowment ▶

The percentages on lines 2a, 2b, and 2c should equal 100%

**3a** Are there endowment funds not in the possession of the organization that are held and administered for the organization by

**(i)** unrelated organizations . . . . .

**(ii)** related organizations . . . . .

**b** If "Yes" on 3a(ii), are the related organizations listed as required on Schedule R? . . . . .

	Yes	No
<b>3a(i)</b>		
<b>3a(ii)</b>		
<b>3b</b>		

**4** Describe in Part XIII the intended uses of the organization's endowment funds

**Part VI Land, Buildings, and Equipment.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
<b>1a</b> Land . . . . .		12,535,382		12,535,382
<b>b</b> Buildings . . . . .		768,153,039	342,569,465	425,583,574
<b>c</b> Leasehold improvements		5,849,806	2,839,052	3,010,754
<b>d</b> Equipment . . . . .		695,054,321	598,338,327	96,715,994
<b>e</b> Other . . . . .		60,885,055	39,776,373	21,108,682
<b>Total.</b> Add lines 1a through 1e (Column (d) must equal Form 990, Part X, column (B), line 10(c)) . . . ▶				558,954,386



Part VII

Investments—Other Securities. Complete if the organization answered "Yes" on Form 990, Part IV, line 11b.  
See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation Cost or end-of-year market value
(1) Financial derivatives . . . . .		
(2) Closely-held equity interests . . . . .	1,805,085	C
(3) Other _____ (A) Securities other	104,523,817	C
(B) Securities real estate	1,189,956	C
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
Total. (Column (b) must equal Form 990, Part X, col (B) line 12 ) ▶	107,518,858	

Part VIII

Investments—Program Related.  
Complete if the organization answered 'Yes' on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

(a) Description of investment	(b) Book value	(c) Method of valuation Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
Total. (Column (b) must equal Form 990, Part X, col (B) line 13 ) ▶		

Part IX

Other Assets. Complete if the organization answered 'Yes' on Form 990, Part IV, line 11d See Form 990, Part X, line 15

(a) Description	(b) Book value
(1)	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, col (B) line 15 ) . . . . . ▶	

Part X

Other Liabilities. Complete if the organization answered 'Yes' on Form 990, Part IV, line 11e or 11f.  
See Form 990, Part X, line 25.

1. (a) Description of liability	(b) Book value	
(1) Federal income taxes		
Due to Affiliated Companies	1,567,175	
Insurance Liability Loss Reserves	7,549,614	
Minimum Pension Liability	51,667,819	
Market Value Swap	2,093,264	
(5)		
(6)		
(7)		
(8)		
(9)		
Total. (Column (b) must equal Form 990, Part X, col (B) line 25 ) ▶	62,877,872	

2. Liability for uncertain tax positions In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48 (ASC 740) Check here if the text of the footnote has been provided in Part XIII ☐

**Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return**

Complete if the organization answered 'Yes' on Form 990, Part IV, line 12a.

<b>1</b>	Total revenue, gains, and other support per audited financial statements . . . . .		<b>1</b>	
<b>2</b>	Amounts included on line 1 but not on Form 990, Part VIII, line 12			
<b>a</b>	Net unrealized gains (losses) on investments . . . . .	<b>2a</b>		
<b>b</b>	Donated services and use of facilities . . . . .	<b>2b</b>		
<b>c</b>	Recoveries of prior year grants . . . . .	<b>2c</b>		
<b>d</b>	Other (Describe in Part XIII ) . . . . .	<b>2d</b>		
<b>e</b>	Add lines <b>2a</b> through <b>2d</b> . . . . .		<b>2e</b>	
<b>3</b>	Subtract line <b>2e</b> from line <b>1</b> . . . . .		<b>3</b>	
<b>4</b>	Amounts included on Form 990, Part VIII, line 12, but not on line <b>1</b>			
<b>a</b>	Investment expenses not included on Form 990, Part VIII, line 7b . . . . .	<b>4a</b>		
<b>b</b>	Other (Describe in Part XIII ) . . . . .	<b>4b</b>		
<b>c</b>	Add lines <b>4a</b> and <b>4b</b> . . . . .		<b>4c</b>	
<b>5</b>	Total revenue. Add lines <b>3</b> and <b>4c</b> . (This must equal Form 990, Part I, line 12 ) . . . . .		<b>5</b>	

**Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.**

Complete if the organization answered 'Yes' on Form 990, Part IV, line 12a.

<b>1</b>	Total expenses and losses per audited financial statements . . . . .		<b>1</b>	
<b>2</b>	Amounts included on line 1 but not on Form 990, Part IX, line 25			
<b>a</b>	Donated services and use of facilities . . . . .	<b>2a</b>		
<b>b</b>	Prior year adjustments . . . . .	<b>2b</b>		
<b>c</b>	Other losses . . . . .	<b>2c</b>		
<b>d</b>	Other (Describe in Part XIII ) . . . . .	<b>2d</b>		
<b>e</b>	Add lines <b>2a</b> through <b>2d</b> . . . . .		<b>2e</b>	
<b>3</b>	Subtract line <b>2e</b> from line <b>1</b> . . . . .		<b>3</b>	
<b>4</b>	Amounts included on Form 990, Part IX, line 25, but not on line <b>1</b> :			
<b>a</b>	Investment expenses not included on Form 990, Part VIII, line 7b . . . . .	<b>4a</b>		
<b>b</b>	Other (Describe in Part XIII ) . . . . .	<b>4b</b>		
<b>c</b>	Add lines <b>4a</b> and <b>4b</b> . . . . .		<b>4c</b>	
<b>5</b>	Total expenses. Add lines <b>3</b> and <b>4c</b> . (This must equal Form 990, Part I, line 18 ) . . . . .		<b>5</b>	

**Part XIII Supplemental Information**

Provide the descriptions required for Part II, lines 3, 5, and 9, Part III, lines 1a and 4, Part IV, lines 1b and 2b, Part V, line 4, Part X, line 2, Part XI, lines 2d and 4b, and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

Return Reference	Explanation
See Additional Data Table	

**Part XIII** Supplemental Information *(continued)*

Return Reference	Explanation

**Additional Data**

**Software ID:**  
**Software Version:**  
**EIN:** 04-2790311  
**Name:** Baystate Medical Center Inc

**Supplemental Information**

Return Reference	Explanation
Schedule D, Part V	Certain endowments are held at Baystate Health Foundation, Inc (BHF), an affiliate, and are reported as temporarily restricted and permanently restricted but Part V has not been completed as it is already addressed on BHF's Form 990 (EIN 04-3549011)

SCHEDULE H  
(Form 990)

Hospitals

OMB No 1545-0047

2018

Open to Public Inspection

► Complete if the organization answered "Yes" on Form 990, Part IV, question 20.  
► Attach to Form 990.  
► Go to [www.irs.gov/Form990EZ](http://www.irs.gov/Form990EZ) for instructions and the latest information.

Department of the Treasury

Internal Revenue Service

Name of the organization  
Baystate Medical Center Inc

Employer identification number  
04-2790311

Part I

Financial Assistance and Certain Other Community Benefits at Cost

	Yes	No
1a Did the organization have a financial assistance policy during the tax year? If "No," skip to question 6a	1a Yes	
b If "Yes," was it a written policy? . . . . .	1b Yes	
2 If the organization had multiple hospital facilities, indicate which of the following best describes application of the financial assistance policy to its various hospital facilities during the tax year <input checked="" type="checkbox"/> Applied uniformly to all hospital facilities <input type="checkbox"/> Applied uniformly to most hospital facilities <input type="checkbox"/> Generally tailored to individual hospital facilities		
3 Answer the following based on the financial assistance eligibility criteria that applied to the largest number of the organization's patients during the tax year a Did the organization use Federal Poverty Guidelines (FPG) as a factor in determining eligibility for providing free care? If "Yes," indicate which of the following was the FPG family income limit for eligibility for free care <input type="checkbox"/> 100% <input checked="" type="checkbox"/> 150% <input type="checkbox"/> 200% <input type="checkbox"/> Other _____ %	3a Yes	
b Did the organization use FPG as a factor in determining eligibility for providing discounted care? If "Yes," indicate which of the following was the family income limit for eligibility for discounted care <input type="checkbox"/> 200% <input type="checkbox"/> 250% <input checked="" type="checkbox"/> 300% <input type="checkbox"/> 350% <input type="checkbox"/> 400% <input type="checkbox"/> Other _____ %	3b Yes	
c If the organization used factors other than FPG in determining eligibility, describe in Part VI the criteria used for determining eligibility for free or discounted care Include in the description whether the organization used an asset test or other threshold, regardless of income, as a factor in determining eligibility for free or discounted care		
4 Did the organization's financial assistance policy that applied to the largest number of its patients during the tax year provide for free or discounted care to the "medically indigent"?	4 Yes	
5a Did the organization budget amounts for free or discounted care provided under its financial assistance policy during the tax year?	5a Yes	
b If "Yes," did the organization's financial assistance expenses exceed the budgeted amount?	5b Yes	
c If "Yes" to line 5b, as a result of budget considerations, was the organization unable to provide free or discounted care to a patient who was eligible for free or discounted care?	5c	No
6a Did the organization prepare a community benefit report during the tax year?	6a Yes	
b If "Yes," did the organization make it available to the public?	6b Yes	
Complete the following table using the worksheets provided in the Schedule H instructions Do not submit these worksheets with the Schedule H		

7

Financial Assistance and Certain Other Community Benefits at Cost

Financial Assistance and Means-Tested Government Programs	(a) Number of activities or programs (optional)	(b) Persons served (optional)	(c) Total community benefit expense	(d) Direct offsetting revenue	(e) Net community benefit expense	(f) Percent of total expense
a Financial Assistance at cost (from Worksheet 1)			13,301,908	4,407,864	8,894,044	0 700 %
b Medicaid (from Worksheet 3, column a)			247,042,289	215,513,905	31,528,384	2 480 %
c Costs of other means-tested government programs (from Worksheet 3, column b)			2,891,590	2,721,502	170,088	0 010 %
d Total Financial Assistance and Means-Tested Government Programs			263,235,787	222,643,271	40,592,516	3 190 %
Other Benefits						
e Community health improvement services and community benefit operations (from Worksheet 4)			2,671,631		2,671,631	0 210 %
f Health professions education (from Worksheet 5)			61,746,514	19,282,056	42,464,458	3 340 %
g Subsidized health services (from Worksheet 6)			20,287,607	13,985,741	6,301,866	0 500 %
h Research (from Worksheet 7)			23,156,394	16,207,843	6,948,551	0 550 %
i Cash and in-kind contributions for community benefit (from Worksheet 8)			1,048,190		1,048,190	0 080 %
j Total. Other Benefits			108,910,336	49,475,640	59,434,696	4 680 %
k Total. Add lines 7d and 7j			372,146,123	272,118,911	100,027,212	7 870 %

**Part II Community Building Activities** Complete this table if the organization conducted any community building activities during the tax year, and describe in Part VI how its community building activities promoted the health of the communities it serves.

	(a) Number of activities or programs (optional)	(b) Persons served (optional)	(c) Total community building expense	(d) Direct offsetting revenue	(e) Net community building expense	(f) Percent of total expense
<b>1</b> Physical improvements and housing						
<b>2</b> Economic development						
<b>3</b> Community support						
<b>4</b> Environmental improvements						
<b>5</b> Leadership development and training for community members						
<b>6</b> Coalition building						
<b>7</b> Community health improvement advocacy						
<b>8</b> Workforce development						
<b>9</b> Other						
<b>10 Total</b>						

**Part III Bad Debt, Medicare, & Collection Practices**

**Section A. Bad Debt Expense**

		Yes	No
<b>1</b> Did the organization report bad debt expense in accordance with Healthcare Financial Management Association Statement No. 15? . . . . .	<b>1</b>	Yes	
<b>2</b> Enter the amount of the organization's bad debt expense. Explain in Part VI the methodology used by the organization to estimate this amount . . . . .	<b>2</b>	6,619,954	
<b>3</b> Enter the estimated amount of the organization's bad debt expense attributable to patients eligible under the organization's financial assistance policy. Explain in Part VI the methodology used by the organization to estimate this amount and the rationale, if any, for including this portion of bad debt as community benefit . . . . .	<b>3</b>	1,260,697	
<b>4</b> Provide in Part VI the text of the footnote to the organization's financial statements that describes bad debt expense or the page number on which this footnote is contained in the attached financial statements			

**Section B. Medicare**

<b>5</b> Enter total revenue received from Medicare (including DSH and IME) . . . . .	<b>5</b>	340,327,804	
<b>6</b> Enter Medicare allowable costs of care relating to payments on line 5 . . . . .	<b>6</b>	306,598,078	
<b>7</b> Subtract line 6 from line 5. This is the surplus (or shortfall) . . . . .	<b>7</b>	33,729,726	
<b>8</b> Describe in Part VI the extent to which any shortfall reported in line 7 should be treated as community benefit. Also describe in Part VI the costing methodology or source used to determine the amount reported on line 6. Check the box that describes the method used:			
<input type="checkbox"/> Cost accounting system	<input type="checkbox"/> Cost to charge ratio	<input checked="" type="checkbox"/> Other	

**Section C. Collection Practices**

<b>9a</b> Did the organization have a written debt collection policy during the tax year? . . . . .	<b>9a</b>	Yes	
<b>b</b> If "Yes," did the organization's collection policy that applied to the largest number of its patients during the tax year contain provisions on the collection practices to be followed for patients who are known to qualify for financial assistance? Describe in Part VI . . . . .	<b>9b</b>	Yes	

**Part IV Management Companies and Joint Ventures** (owned 10% or more by officers, directors, trustees, key employees, and physicians—see instructions)

(a) Name of entity	(b) Description of primary activity of entity	(c) Organization's profit % or stock ownership %	(d) Officers, directors, trustees, or key employees' profit % or stock ownership %	(e) Physicians' profit % or stock ownership %
<b>1</b>				
<b>2</b>				
<b>3</b>				
<b>4</b>				
<b>5</b>				
<b>6</b>				
<b>7</b>				
<b>8</b>				
<b>9</b>				
<b>10</b>				
<b>11</b>				
<b>12</b>				
<b>13</b>				

**Part V Facility Information****Section A. Hospital Facilities**

(list in order of size from largest to smallest—see instructions)

How many hospital facilities did the organization operate during the tax year?

**1**

Name, address, primary website address, and state license number (and if a group return, the name and EIN of the subordinate hospital organization that operates the hospital facility)

	Other (describe)	ER-other	ER-24 hours	Research facility	Critical access hospital	Teaching hospital	Children's hospital	General medical & surgical	Licensed hospital	Facility reporting group
See Additional Data Table										

**Part V Facility Information** (continued)**Section B. Facility Policies and Practices**

(Complete a separate Section B for each of the hospital facilities or facility reporting groups listed in Part V, Section A)  
 Baystate Medical Center Inc

**Name of hospital facility or letter of facility reporting group** \_\_\_\_\_

**Line number of hospital facility, or line numbers of hospital facilities in a facility reporting group (from Part V, Section A):** \_\_\_\_\_

1

**Community Health Needs Assessment**

	Yes	No
<b>1</b> Was the hospital facility first licensed, registered, or similarly recognized by a state as a hospital facility in the current tax year or the immediately preceding tax year? . . . . .	<b>1</b>	No
<b>2</b> Was the hospital facility acquired or placed into service as a tax-exempt hospital in the current tax year or the immediately preceding tax year? If "Yes," provide details of the acquisition in Section C . . . . .	<b>2</b>	No
<b>3</b> During the tax year or either of the two immediately preceding tax years, did the hospital facility conduct a community health needs assessment (CHNA)? If "No," skip to line 12 . . . . . If "Yes," indicate what the CHNA report describes (check all that apply)	<b>3</b> Yes	
<b>a</b> <input checked="" type="checkbox"/> A definition of the community served by the hospital facility		
<b>b</b> <input checked="" type="checkbox"/> Demographics of the community		
<b>c</b> <input checked="" type="checkbox"/> Existing health care facilities and resources within the community that are available to respond to the health needs of the community		
<b>d</b> <input checked="" type="checkbox"/> How data was obtained		
<b>e</b> <input checked="" type="checkbox"/> The significant health needs of the community		
<b>f</b> <input checked="" type="checkbox"/> Primary and chronic disease needs and other health issues of uninsured persons, low-income persons, and minority groups		
<b>g</b> <input checked="" type="checkbox"/> The process for identifying and prioritizing community health needs and services to meet the community health needs		
<b>h</b> <input checked="" type="checkbox"/> The process for consulting with persons representing the community's interests		
<b>i</b> <input checked="" type="checkbox"/> The impact of any actions taken to address the significant health needs identified in the hospital facility's prior CHNA(s)		
<b>j</b> <input type="checkbox"/> Other (describe in Section C)		
<b>4</b> Indicate the tax year the hospital facility last conducted a CHNA 20 <u>18</u>		
<b>5</b> In conducting its most recent CHNA, did the hospital facility take into account input from persons who represent the broad interests of the community served by the hospital facility, including those with special knowledge of or expertise in public health? If "Yes," describe in Section C how the hospital facility took into account input from persons who represent the community, and identify the persons the hospital facility consulted . . . . .	<b>5</b> Yes	
<b>6 a</b> Was the hospital facility's CHNA conducted with one or more other hospital facilities? If "Yes," list the other hospital facilities in Section C . . . . .	<b>6a</b> Yes	
<b>b</b> Was the hospital facility's CHNA conducted with one or more organizations other than hospital facilities? If "Yes," list the other organizations in Section C . . . . .	<b>6b</b> Yes	
<b>7</b> Did the hospital facility make its CHNA report widely available to the public? . . . . . If "Yes," indicate how the CHNA report was made widely available (check all that apply)	<b>7</b> Yes	
<b>a</b> <input checked="" type="checkbox"/> Hospital facility's website (list url) <u>See Part V narratives</u>		
<b>b</b> <input checked="" type="checkbox"/> Other website (list url) <u>See Part V narratives</u>		
<b>c</b> <input checked="" type="checkbox"/> Made a paper copy available for public inspection without charge at the hospital facility		
<b>d</b> <input checked="" type="checkbox"/> Other (describe in Section C)		
<b>8</b> Did the hospital facility adopt an implementation strategy to meet the significant community health needs identified through its most recently conducted CHNA? If "No," skip to line 11 . . . . .	<b>8</b> Yes	
<b>9</b> Indicate the tax year the hospital facility last adopted an implementation strategy 20 <u>16</u>		
<b>10</b> Is the hospital facility's most recently adopted implementation strategy posted on a website? . . . . . If "Yes" (list url) <u>See Part V narratives</u>	<b>10</b> Yes	
<b>a</b>		
<b>b</b> If "No," is the hospital facility's most recently adopted implementation strategy attached to this return? . . . . .	<b>10b</b>	
<b>11</b> Describe in Section C how the hospital facility is addressing the significant needs identified in its most recently conducted CHNA and any such needs that are not being addressed together with the reasons why such needs are not being addressed		
<b>12a</b> Did the organization incur an excise tax under section 4959 for the hospital facility's failure to conduct a CHNA as required by section 501(r)(3)? . . . . .	<b>12a</b>	No
<b>b</b> If "Yes" on line 12a, did the organization file Form 4720 to report the section 4959 excise tax? . . . . .	<b>12b</b>	
<b>c</b> If "Yes" on line 12b, what is the total amount of section 4959 excise tax the organization reported on Form 4720 for all of its hospital facilities? \$ _____		



Part V Facility Information (continued)

Financial Assistance Policy (FAP)

Baystate Medical Center Inc			
Name of hospital facility or letter of facility reporting group			
Did the hospital facility have in place during the tax year a written financial assistance policy that			
13	Explained eligibility criteria for financial assistance, and whether such assistance included free or discounted care? If "Yes," indicate the eligibility criteria explained in the FAP	13	Yes
a	<input checked="" type="checkbox"/> Federal poverty guidelines (FPG), with FPG family income limit for eligibility for free care of 150 000000000000 % and FPG family income limit for eligibility for discounted care of 300 000000000000 %		
b	<input checked="" type="checkbox"/> Income level other than FPG (describe in Section C)		
c	<input type="checkbox"/> Asset level		
d	<input checked="" type="checkbox"/> Medical indigency		
e	<input checked="" type="checkbox"/> Insurance status		
f	<input type="checkbox"/> Underinsurance discount		
g	<input type="checkbox"/> Residency		
h	<input type="checkbox"/> Other (describe in Section C)		
14	Explained the basis for calculating amounts charged to patients?	14	Yes
15	Explained the method for applying for financial assistance? If "Yes," indicate how the hospital facility's FAP or FAP application form (including accompanying instructions) explained the method for applying for financial assistance (check all that apply)	15	Yes
a	<input checked="" type="checkbox"/> Described the information the hospital facility may require an individual to provide as part of his or her application		
b	<input checked="" type="checkbox"/> Described the supporting documentation the hospital facility may require an individual to submit as part of his or her application		
c	<input checked="" type="checkbox"/> Provided the contact information of hospital facility staff who can provide an individual with information about the FAP and FAP application process		
d	<input checked="" type="checkbox"/> Provided the contact information of nonprofit organizations or government agencies that may be sources of assistance with FAP applications		
e	<input checked="" type="checkbox"/> Other (describe in Section C)		
16	Was widely publicized within the community served by the hospital facility? If "Yes," indicate how the hospital facility publicized the policy (check all that apply)	16	Yes
a	<input checked="" type="checkbox"/> The FAP was widely available on a website (list url) <a href="https://www.baystatehealth.org/patients/billing-and-financial-assistance">https://www.baystatehealth.org/patients/billing-and-financial-assistance</a>		
b	<input checked="" type="checkbox"/> The FAP application form was widely available on a website (list url) <a href="https://www.baystatehealth.org/patients/billing-and-financial-assistance">https://www.baystatehealth.org/patients/billing-and-financial-assistance</a>		
c	<input checked="" type="checkbox"/> A plain language summary of the FAP was widely available on a website (list url) <a href="https://www.baystatehealth.org/patients/billing-and-financial-assistance">https://www.baystatehealth.org/patients/billing-and-financial-assistance</a>		
d	<input checked="" type="checkbox"/> The FAP was available upon request and without charge (in public locations in the hospital facility and by mail)		
e	<input checked="" type="checkbox"/> The FAP application form was available upon request and without charge (in public locations in the hospital facility and by mail)		
f	<input checked="" type="checkbox"/> A plain language summary of the FAP was available upon request and without charge (in public locations in the hospital facility and by mail)		
g	<input checked="" type="checkbox"/> Individuals were notified about the FAP by being offered a paper copy of the plain language summary of the FAP, by receiving a conspicuous written notice about the FAP on their billing statements, and via conspicuous public displays or other measures reasonably calculated to attract patients' attention		
h	<input checked="" type="checkbox"/> Notified members of the community who are most likely to require financial assistance about availability of the FAP		
i	<input checked="" type="checkbox"/> The FAP, FAP application form, and plain language summary of the FAP were translated into the primary language(s) spoken by LEP populations		
j	<input checked="" type="checkbox"/> Other (describe in Section C)		

**Part V Facility Information** (continued)**Billing and Collections**

Baystate Medical Center Inc

**Name of hospital facility or letter of facility reporting group**

	Yes	No
<b>17</b> Did the hospital facility have in place during the tax year a separate billing and collections policy, or a written financial assistance policy (FAP) that explained all of the actions the hospital facility or other authorized party may take upon nonpayment? . . . . .	<b>17</b> Yes	
<b>18</b> Check all of the following actions against an individual that were permitted under the hospital facility's policies during the tax year before making reasonable efforts to determine the individual's eligibility under the facility's FAP		
<b>a</b> <input type="checkbox"/> Reporting to credit agency(ies) <b>b</b> <input type="checkbox"/> Selling an individual's debt to another party <b>c</b> <input type="checkbox"/> Deferring, denying, or requiring a payment before providing medically necessary care due to nonpayment of a previous bill for care covered under the hospital facility's FAP <b>d</b> <input type="checkbox"/> Actions that require a legal or judicial process <b>e</b> <input type="checkbox"/> Other similar actions (describe in Section C) <b>f</b> <input checked="" type="checkbox"/> None of these actions or other similar actions were permitted		
<b>19</b> Did the hospital facility or other authorized party perform any of the following actions during the tax year before making reasonable efforts to determine the individual's eligibility under the facility's FAP? . . . . .	<b>19</b>	No
If "Yes," check all actions in which the hospital facility or a third party engaged		
<b>a</b> <input type="checkbox"/> Reporting to credit agency(ies) <b>b</b> <input type="checkbox"/> Selling an individual's debt to another party <b>c</b> <input type="checkbox"/> Deferring, denying, or requiring a payment before providing medically necessary care due to nonpayment of a previous bill for care covered under the hospital facility's FAP <b>d</b> <input type="checkbox"/> Actions that require a legal or judicial process <b>e</b> <input type="checkbox"/> Other similar actions (describe in Section C)		
<b>20</b> Indicate which efforts the hospital facility or other authorized party made before initiating any of the actions listed (whether or not checked) in line 19 (check all that apply)		
<b>a</b> <input checked="" type="checkbox"/> Provided a written notice about upcoming ECAs (Extraordinary Collection Action) and a plain language summary of the FAP at least 30 days before initiating those ECAs <b>b</b> <input checked="" type="checkbox"/> Made a reasonable effort to orally notify individuals about the FAP and FAP application process <b>c</b> <input checked="" type="checkbox"/> Processed incomplete and complete FAP applications <b>d</b> <input checked="" type="checkbox"/> Made presumptive eligibility determinations <b>e</b> <input type="checkbox"/> Other (describe in Section C) <b>f</b> <input type="checkbox"/> None of these efforts were made		

**Policy Relating to Emergency Medical Care**

<b>21</b> Did the hospital facility have in place during the tax year a written policy relating to emergency medical care that required the hospital facility to provide, without discrimination, care for emergency medical conditions to individuals regardless of their eligibility under the hospital facility's financial assistance policy? . . . . .	<b>21</b> Yes	
If "No," indicate why		
<b>a</b> <input type="checkbox"/> The hospital facility did not provide care for any emergency medical conditions <b>b</b> <input type="checkbox"/> The hospital facility's policy was not in writing <b>c</b> <input type="checkbox"/> The hospital facility limited who was eligible to receive care for emergency medical conditions (describe in Section C) <b>d</b> <input type="checkbox"/> Other (describe in Section C)		

**Part V Facility Information** *(continued)***Charges to Individuals Eligible for Assistance Under the FAP (FAP-Eligible Individuals)**

Baystate Medical Center Inc

**Name of hospital facility or letter of facility reporting group** \_\_\_\_\_**22** Indicate how the hospital facility determined, during the tax year, the maximum amounts that can be charged to FAP-eligible individuals for emergency or other medically necessary care

- a** ☐ The hospital facility used a look-back method based on claims allowed by Medicare fee-for-service during a prior 12-month period
- b** ☒ The hospital facility used a look-back method based on claims allowed by Medicare fee-for-service and all private health insurers that pay claims to the hospital facility during a prior 12-month period
- c** ☐ The hospital facility used a look-back method based on claims allowed by Medicaid, either alone or in combination with Medicare fee-for-service and all private health insurers that pay claims to the hospital facility during a prior 12-month period
- d** ☐ The hospital facility used a prospective Medicare or Medicaid method

**23** During the tax year, did the hospital facility charge any FAP-eligible individual to whom the hospital facility provided emergency or other medically necessary services more than the amounts generally billed to individuals who had insurance covering such care? . . . . .

If "Yes," explain in Section C

**24** During the tax year, did the hospital facility charge any FAP-eligible individual an amount equal to the gross charge for any service provided to that individual? . . . . .

If "Yes," explain in Section C

	Yes	No
<b>23</b>		No
<b>24</b>		No

**Section C. Supplemental Information for Part V, Section B.** Provide descriptions required for Part V, Section B, lines 2, 3j, 5, 6a, 6b, 7d, 11, 13b, 13h, 15e, 16j, 18e, 19e, 20e, 21c, 21d, 23, and 24. If applicable, provide separate descriptions for each hospital facility in a facility reporting group, designated by facility reporting group letter and hospital facility line number from Part V, Section A ("A, 1," "A, 4," "B, 2," "B, 3," etc.) and name of hospital facility.

[illegible]

**Part V** **Facility Information** *(continued)***Section D. Other Health Care Facilities That Are Not Licensed, Registered, or Similarly Recognized as a Hospital Facility**

(list in order of size, from largest to smallest)

How many non-hospital health care facilities did the organization operate during the tax year? **14**

Name and address	Type of Facility (describe)
<b>1</b> See Additional Data Table	
<b>2</b>	
<b>3</b>	
<b>4</b>	
<b>5</b>	
<b>6</b>	
<b>7</b>	
<b>8</b>	
<b>9</b>	
<b>10</b>	

**Part VI Supplemental Information**

Provide the following information

- 1 Required descriptions.** Provide the descriptions required for Part I, lines 3c, 6a, and 7, Part II and Part III, lines 2, 3, 4, 8 and 9b
- 2 Needs assessment.** Describe how the organization assesses the health care needs of the communities it serves, in addition to any CHNAs reported in Part V, Section B
- 3 Patient education of eligibility for assistance.** Describe how the organization informs and educates patients and persons who may be billed for patient care about their eligibility for assistance under federal, state, or local government programs or under the organization's financial assistance policy
- 4 Community information.** Describe the community the organization serves, taking into account the geographic area and demographic constituents it serves
- 5 Promotion of community health.** Provide any other information important to describing how the organization's hospital facilities or other health care facilities further its exempt purpose by promoting the health of the community (e g , open medical staff, community board, use of surplus funds, etc )
- 6 Affiliated health care system.** If the organization is part of an affiliated health care system, describe the respective roles of the organization and its affiliates in promoting the health of the communities served
- 7 State filing of community benefit report.** If applicable, identify all states with which the organization, or a related organization, files a community benefit report

**990 Schedule H, Supplemental Information**

Form and Line Reference	Explanation
Part I, Line 6a	The hospital facility files an annual community benefits report electronically with the Massachusetts Office of the Attorney General via their website at <a href="https://www.mass.gov/nonprofit-hospital-and-hmo-community-benefits">https://www.mass.gov/nonprofit-hospital-and-hmo-community-benefits</a> . The hospital facility's annual community benefits report is also published on the Baystate Health website at <a href="https://www.baystatehealth.org/about-us/community-programs/community-benefits/community-health-needs-assessment">https://www.baystatehealth.org/about-us/community-programs/community-benefits/community-health-needs-assessment</a> . The hospital's community benefits report provides the Office of the Attorney General and the general public important information about how the hospital partners with the community to identify and address health needs, as well as details the specific programs and activities the hospital implements or supports to address significant health needs.

**990 Schedule H, Supplemental Information**

Form and Line Reference	Explanation
Part I, Line 7	<p>Line 7a (Charity Care) - community benefit expense was calculated by applying the ratio of patient care cost to charges, calculated on Worksheet 2, against total charity care gross patient charges from the audited financial statements</p> <p>Line 7b (Unreimbursed Medicaid) - community benefit expense was derived using the organization's cost accounting system, which takes into account all hospital inpatients, outpatients and emergency room patients for whom services were provided and covered under Medicaid and Medicaid managed care plans</p> <p>Line 7c (Other Means-Tested Programs) - community benefit expense was derived using the organization's cost accounting system, which takes into account all hospital inpatients, outpatients and emergency room patients for whom services were provided and covered under other means-tested government programs</p> <p>Line 7e (Community Health Improvement Services &amp; Benefit Operations) - Community Health Improvement Services calculations are derived from direct and indirect costs associated with community benefit activities that are aligned with the hospital's 2019 community health needs assessment. These activities are carried out to improve community health and wellness and extend beyond patient care, beyond the walls of the hospital. Community Benefit Operations calculations are derived from costs associated with assigned staff and community health needs and/or assets assessment, as well as other costs associated with community benefits strategy and operations</p> <p>Line 7f (Health Professional Education) - community benefit expense was derived using the organization's cost accounting system</p> <p>Line 7g (Subsidized Programs) - community benefit expense was derived using the organization's cost accounting system. The expense relates to specific outpatient programs. There are no costs attributable to physician clinics reported as subsidized health services in Part I, line 7g</p> <p>Line 7h (Research) - community benefit expense was derived using the organization's cost accounting system. In addition to the research costs reported on line 7h, there was \$771,488 of expenses related to Industry-sponsored grants that we believe should be treated as community benefit expense because they were incurred to promote the health and well-being of the local population and are a key component of our commitment to the community</p>

**990 Schedule H, Supplemental Information**

Form and Line Reference	Explanation
Part I, Ln 7 Col(f)	<p>In fiscal year 2019, the organization adopted the provisions of Accounting Standards Update 2014-09, Revenue from Contracts with Customers (Topic 606) ("ASU 2014-09") The update resulted in changes in the presentation and disclosure of revenue primarily related to uninsured and underinsured patients Under ASU 2014-09 the estimated uncollectible amounts due from these patients are generally considered implicit price concessions that are a direct reduction to net operating revenues In 2019, these implicit price concessions, formerly known as provision for bad debts, totalled \$19,677,524 and is not included in total expenses reported in Part IX, Line 25, column (A) fro the purpose of calculating the percentages in Part I, Line 7, column (f)</p>



**990 Schedule H, Supplemental Information**

Form and Line Reference	Explanation
Part II, Community Building Activities	<p>The following description is not quantified specifically in Part II of Schedule H. The hospital facility is committed to creating healthier communities and understands that many state and federal mandated community benefit programs and services are not sufficient to address ethnic, racial and economic health disparities and inequities. The hospital embraces the traditional definition of "health" to include economic opportunity, affordable housing, quality education, safe neighborhoods, food security, social and racial justice, and the arts/culture - all elements that are needed for individuals, families and communities to thrive. The hospital provides many valuable services, resources, programs and financial support - beyond the walls of the hospital and into the communities and homes of the people it serves, including grants and sponsorship of local community-based organizations and the involvement of Baystate leadership with various community boards that align with its mission. The hospital facility provided \$220,398 as Payment in Lieu of Taxes (PILOT) to the City of Springfield for its facilities at 3400 Main Street and 11 Wilbraham Road. Baystate Medical Center provided \$14,850 as a Payment in Lieu of Taxes (PILOT) to the City of Chicopee for an employee parking lot located at Center Street, Chicopee. The hospital facility is a dues paying member of the Economic Development Council of Western Massachusetts (EDC) and the Springfield Regional Chamber of Commerce, in the amount of \$86,249. The hospital participates in the EDC and local Chambers as it is the largest employer in the region. The Chamber and its members coordinate activities toward a common purpose of sustainability and economic growth for the region.</p>

**990 Schedule H, Supplemental Information**

Form and Line Reference	Explanation
Part III, Line 4	<p>The cost of bad debts reported in Part III, line 2 was calculated by applying a ratio of cost to charges (based on the organization's cost accounting system including all hospital inpatients and outpatients) against total implicit price concessions as reflected in the audited financial statements. The portion of bad debt that reasonably could be attributable to patients who may qualify for financial assistance under the hospital's charity care program (reported in Part III line 3) was calculated by applying the percentage of bad debts by zip code (for which the average household income for each zip code is less than 150% of the federal poverty level) to the total cost of bad debt reported in Part III line 2. Since this portion of bad debt is attributable to patients residing in an area where the average income is less than 150% of the Federal poverty level, it is highly likely these patients would have qualified for the organization's charity care program had they applied. For this reason, we believe the amount, totalling \$1,260,637 should be treated as community benefit expense in Part I. As noted above, the organization adopted Accounting Standards Update 2014-09 effective October 1, 2018, which changed the way entities report and disclose certain financial information including implicit price concession (formerly the provision for bad debts). See audited financial statements, footnote #2 (Significant Accounting Policies) on page 15 under the caption "Net Patient Service Revenue" and page 17 under the caption "Recently Adopted Accounting Pronouncements" for a description of the organization's reporting of its implicit price concessions (formerly provision for bad debts). If a patient is determined eligible for financial assistance, the appropriate adjustment is made to the patient account based on their income level. Once the necessary approvals are obtained, it then flows to the general ledger. Patients applying for a prompt payment discount will have this allowance entered after agreed upon payment is received.</p>

# 990 Schedule H, Supplemental Information

Form and Line Reference	Explanation
Part III, Line 8	Line 6 - included all Medicare allowable costs as calculated in Worksheets D-1 Part II (inpatient and inpatient psych), D Part V (outpatient) and E Part A (organ acquisition) of the hospital's 2019 Medicare cost report, net of Medicare costs reported in Part 1, line 7g, and based on Medicare costing principles There is no shortfall reported on line 7

## 990 Schedule H, Supplemental Information

Form and Line Reference	Explanation
Part III, Line 9b	<p>For patients who are known to qualify for Charity Care or Financial Assistance The patient may have requested assistance up front at time of service with a Financial Counselor or the Patient could have asked for assistance after receiving their bill by contacting our Patient Billing Services Representatives The Financial Counselor will assist the patient in applying for the appropriate type of assistance based on their income and circumstances Once approved for a State Medicaid or other program, all billing and collection activity will stop (except for required co-payments or deductibles) For all other patients, our statements contain information regarding how to apply for financial assistance Notices concerning availability for assistance are also posted at patient care sites</p>

**990 Schedule H, Supplemental Information**

Form and Line Reference	Explanation
Part VI, Line 2	<p>The Baystate Board Governance Committee convenes semi-annually and is charged with advocating for community benefits at the board level and throughout the health system and broader community, aligning the system's four (4) hospital-specific community benefits implementation strategies with the health system's strategic plan, review of CHNA data, approval of a community benefits mission statement and health priorities, review impacts of community benefits activities and investments, and ensure Baystate Health's community benefits are in compliance with guidelines established by the MA Attorney General and IRS. Annually, the Office of Government and Community Relations provides updates to the Baystate Board of Trustees, Baystate President's Cabinet, and other Baystate leadership teams, as requested. The hospital Community Benefits Advisory Council (CBAC) continues to bring a community lens and filter for the hospital's health priorities. The CBAC provides a community perspective on how to increase wellness and resilience opportunities for optimal health for an entire population, guidance in matching hospital resources to community resources, thus making the most of what is possible with the goal to improve health status and quality of life, and policy advocacy to assure and restore health equity by targeting resources for residents. Participants on the hospital CBAC represent constituencies and communities served by the hospital. CBAC members are responsible for reviewing community needs assessment data and use this analysis as a foundation for providing the hospital with input on its community benefits planning process. Baystate Health Patient &amp; Family Advisory Council (PFAC) members provided valuable input in enhancing care at Baystate Health based on the knowledge of the unique needs of patients and families. Information from PFAC provides hospital leadership with an enhanced understanding of how to improve quality, program development, service excellence, communications, patient safety, facility design, patient and family education, patient and family satisfaction, and loyalty. PFAC is made up of a diverse group of patients, family members, and community members who represent the collective voice of the patients and families at Baystate Medical Center, Baystate Children's Hospital, Baystate Franklin Medical Center, Baystate Noble Hospital, Baystate Mary Lane Outpatient Center, Baystate Wing Hospital, the D'Amour Center for Cancer Care, and the BeHealthy ACO in Baystate managed health centers.</p>

990 Schedule H, Supplemental Information

Form and Line Reference	Explanation
Part VI, Line 3	<p>The hospital is committed to ensuring that patients in its community have access to quality health care services with fairness and respect without regard to the patients' ability to pay. The hospital recognizes the cost of necessary health care services can impose a significant financial burden on patients who are uninsured or underinsured, and acts affirmatively to lessen that burden by offering eligible patients the opportunity to apply for free or reduced cost services. The hospital not only offers free and reduced cost care as required by law, but has also voluntarily established discount and financial assistance programs that provide additional free and reduced cost care to more patients residing within the communities served by the hospital. The hospital recognizes the billing and collection process can be bewildering and burdensome for patients and has implemented procedures to make the process understandable for patients, to inform patients about discount and financial assistance options, and to ensure that patients are not subject to aggressive collection activities. Consistent with its patient commitment, the hospital is required to maintain a financial assistance policy and a billing and collection policy that reflects its financial assistance options and patient billing and collection procedures and complies with applicable federal and state laws and regulations. The hospital has financial counselors available to help patients apply for financial assistance programs that may cover unpaid hospital bills, including a variety of federal and state programs as well as financial assistance through the hospital. Hospital financial counselors have all been trained and certified by the state as Certified Account Counselors to assist patients in applying for available federal and state programs. The hospital is committed to ensuring that patients or prospective patients in the community are aware of financial assistance programs. For uninsured or underinsured patients, the hospital will assist in applying for available financial assistance programs. The hospital notifies patients of the availability of assistance in both the initial bill sent to patients, as well as in general notices posted throughout the hospital. When applicable, the hospital also assists patients in applying for coverage of services as a Medical Hardship based on the patient's documented income and allowable medical expenses. The hospital provides, upon request, specific information about the eligibility process to be a Low Income Patient under either the Massachusetts Health Safety Net Program or additional assistance for patients who are low income through Baystate's own internal financial assistance program. The hospital also notifies patients about available payment plans based on their family size and income. Baystate Health's Financial Assistance Policy and Billing and Collection Policy are posted on the baystatehealth.org website at <a href="https://www.baystatehealth.org/patients/billing-and-financial-assistance">https://www.baystatehealth.org/patients/billing-and-financial-assistance</a>. The goal of posting the Financial Assistance Policy and the Billing and Collection Policy is to ensure that patients or prospective patients in the community are aware of the financial assistance programs. Signs about the availability of financial assistance programs at the hospital are translated into Spanish and Russian as these languages are primarily spoken by more than 1,000 or 1% of the residents in the hospital's service area. Signs are large and clearly visible. Hospital signs are 8 5/8 x 11 inches and the header print font is 24 points. Notice of availability of Financial Assistance Programs are posted in the following locations: inpatient, clinic, emergency department admissions and/or registration areas, central admission/registration area, patient financial counselor areas, and business office areas that are open to patients.</p>

990 Schedule H, Supplemental Information

Form and Line Reference	Explanation
Part VI, Line 4	<p>The following "community information" description is extracted from the hospital's 2019 CHNA Baystate Medical Center (Baystate Medical) is a 724-bed academic medical center based in Springfield, Massachusetts Baystate Medical is home to western New England's only tertiary care referral medical center, Level I Trauma Center and Level II Pediatric Trauma Center, and neonatal and pediatric intensive care units The medical center also includes Baystate Children's Hospital and the Wesson Women and Infants' Unit, and is the regional campus of the University of Massachusetts Medical School - Baystate Baystate Medical is also the community's major referral hospital, providing the highest level of care for conditions such as cancer, acute, and chronic cardiovascular illness, nervous system illness, digestive illness, and other diseases that affect the major organs of the body The service area for Baystate Medical includes all 23 communities within Hampden County, including the third largest city in Massachusetts - Springfield (population over 150,000) Three adjacent cities (Holyoke, Chicopee, and West Springfield) create a densely-populated urban core that includes over half of the population of the service area (270,000 people), and 91% of Hampden County is classified as urban (US Census, 2013-2017) Smaller communities exist to the east and west of this central core area Many of these communities have populations under 20,000 people The Pioneer Valley Transit Authority, the second largest public transit system in the state, serves 11 communities in the service area, and connects suburban areas to the core cities and services The service area has more racial and ethnic diversity than many other parts of western Massachusetts County-wide, 24% of the population is Latino, 8% is black, and 2% is Asian (ACS, 2013-2017), though this diversity is not equally spread throughout the region and tends to be concentrated in the urban core A substantial proportion of the county's population is from other countries In 2017, 22% of the state's immigrants came to western Massachusetts West Springfield has welcomed the highest proportion in Hampden County, 15% of the city's population are foreign-born (US Census, ACS, 2013-2017) Economically, the Baystate Medical service area is home to many of the largest employers in the region as well as numerous colleges and universities, and provides a strong economic engine for the broader region The largest industries and employers include health care service, and wholesale trade and manufacturing At the same time, the county struggles with higher rates of unemployment and poverty, lower household incomes, and lower rates of educational attainment The median household income in the service area is about \$52,000 (\$22,000 less than the state) The poverty rate is more than 60% higher than statewide, and the child poverty rate is an alarming 27%, with more than one out of every four children in Hampden County living in poverty (ACS, 2013-2017) Despite being at the core of the Knowledge Corridor region, only 27% of the population age 25 and over has a bachelor's degree, compared to 43% statewide Unemployment is somewhat higher than the state average The median age for the service area is similar to that of Massachusetts, although in Springfield the median age is about 33 years of age compared to 39 in Hampden County The population over 45 years old is growing as a percentage of the total population (Table 2) To give a sense of the change in service needs necessary, by 2035, the proportion of the people over the age of 60 is projected to grow from 20% of the population to 28% in Hampden County, with the number of older adults increasing from approximately 92,000 in 2010 to an estimated 140,000 in 2035 In Hampden County 16% of the population has a disability compared to the state rate of 12% In Springfield and Holyoke, disability rates are high at almost 20% and 17% respectively In Hampden County, 11% of youth under 18 have disability (state - 7%) By race and ethnicity, 6% of white children, 10% of Latino children, and 6% of black children have a disability (US Census, ACS, 2013-2017) People with disabilities tend to have higher rates of poverty and lower levels of education In Hampden County, poverty rates among those with a disability (27%) were more than double those among people without a disability (12%) Similarly, 30% of the disabled population did not have a high school diploma compared to 11% among those without a disability (US Census, ACS, 2013-2017)</p>

**990 Schedule H, Supplemental Information**

Form and Line Reference	Explanation
Part VI, Line 5	<p>The hospital facility has a responsibility to respond to health care needs unsupported by government programs. In exchange for this responsibility, the hospital qualifies for tax-exempt status under 501(c)(3). However, providing hospital care alone is not enough to qualify for tax-exempt status. Hospitals also must operate in the public interest and provide programs that benefit the community. The charitable mission of the hospital facility, a member hospital of Baystate Health, is to improve the health of the people in our communities every day, with quality and compassion. The hospital's Community Benefits Mission is to reduce health disparities, promote community wellness and improve access to care for vulnerable populations. The hospital is committed to meeting the identified health and wellness needs of constituencies and communities served through the combined efforts of Baystate Health's member organizations, affiliated providers, and community partners. The hospital facility meets all of the factors required of medical facilities in order to maintain tax exemption, as first described in Revenue Ruling 69-545. In support of patient care and the medical needs of the communities served by the hospital, medical staff membership and privileges are extended to all qualified physicians and practitioners in western Massachusetts who meet the requirements for credentialing and clinical privileges, whether employed by a related Baystate Health or community-based entity. The hospital's emergency department is open to all in need of care and services, no one requiring emergency care is denied treatment. In addition, surplus funds from operations are generally applied, as permitted, to the following, improvements in patient care, expansion and renovation of existing facilities, purchase and replacement of equipment, debt service, expenses associated with training of physicians and other health care professionals, professional development of medical and other clinical staff, and the support of scientific, translational, and clinical research. Baystate Health's volunteer Board of Trustees, the governing body of the organization and its affiliates, is comprised of the President and Chief Executive Officer of Baystate Health and up to twenty-two (22) other elected trustees who are representative of the broad range of interests which exist in the communities served by Baystate Health and its affiliates. The Governance Committee oversees the nomination of trustees and submits recommendations to the Board of Trustees for membership on the various board committees. In considering nominations or recommendations for trustees, directors, committee members or officers, the Governance Committee selects nominees who are representative of the various and diverse constituencies served by Baystate Health and its affiliates. In particular the Committee nominates persons who are representative of the community consumer interests of the various neighborhoods and localities which are served by Baystate Health and its affiliates in the carrying out of and pursuant to the charitable mission of the Baystate Health and its affiliates. Please refer to the section above in line 2 for additional examples of the hospital's responsiveness to the community and opportunities for community involvement, including the Board of Trustees' Governance Committee, Community Benefits Advisory Council, and Community Health Needs Assessment. For additional information, please see Line 6 below.</p>



Form and Line Reference	Explanation
Part VI, Line 6	<p>Baystate Health is a not-for-profit integrated healthcare system serving over 800,000 people throughout western Massachusetts. Nationally recognized as a leader in healthcare quality and safety, Baystate Health has more than 12,000 employees and serves a diverse population of patients at its teaching hospital, Baystate Medical Center in Springfield, as well as at Baystate Children's Hospital, its three community hospitals, several urban health centers, home care and hospice services, and a network of over 80 medical practices. The four hospitals include Baystate Medical Center, Baystate Franklin Medical Center, Baystate Noble Hospital, and Baystate Wing Hospital (which includes Baystate Mary Lane Outpatient Center), the other 501(c)(3) organizations include Baystate Medical Practices, Visiting Nurse Association and Hospice of Western New England, Baystate Administrative Services, and Baystate Health Foundation. Baystate Medical Center (Baystate Medical) is a 724-bed academic medical center based in Springfield, Massachusetts. Baystate Medical is home to western New England's only tertiary care referral medical center, Level I Trauma Center and Level II Pediatric Trauma Center, and neonatal and pediatric intensive care units. The medical center also includes Baystate Children's Hospital and the Wesson Women and Infants' Unit, and is the regional campus of the University of Massachusetts Medical School - Baystate. Baystate Medical is also the community's major referral hospital, providing the highest level of care for conditions such as cancer, acute, and chronic cardiovascular illness, nervous system illness, digestive illness, and other diseases that affect the major organs of the body. Baystate Children's Hospital, part of Baystate Medical Center, is the only accredited full-service children's hospital and pediatric-specific emergency department in western Massachusetts. It provides primary and advanced medical care to babies, children, adolescents, and their families. Baystate Franklin Medical Center (Baystate Franklin) is an 89-bed facility located in Greenfield, Massachusetts, that provides high-quality inpatient and outpatient services to residents of rural Franklin County and North Quabbin. Inpatient services include behavioral health, intensive care, medical-surgical care, and obstetrics/midwifery. Outpatient services include cardiology, cardiac rehabilitation and wellness, emergency medicine, gastroenterology, general surgery, neurology, oncology, 3D mammography, radiology, cancer care and infusion, ophthalmology, orthopedics, pediatrics, physical medicine and rehabilitation, pain management, endoscopy, pulmonology and sleep medicine, sports medicine, vascular surgery, and wound care and hyperbaric medicine. In addition, through a partnership with the CHCFC, a dental clinic is located in the Baystate Franklin emergency department. Baystate Noble Hospital (Baystate Noble) is a 97-bed acute care community hospital helping people in the greater Westfield community, offering direct access to world-class technology, diagnostics, and specialists. The hospital works to ensure that patients have access to exceptional healthcare, close to home. Skilled and compassionate nurses and medical support staff offer an ideal combination of "high tech" and "high touch", complementing an outstanding team of doctors. Services include obstetrics and gynecology, emergency, laboratory, gastroenterology, surgery, cardiopulmonary services and rehabilitation, cancer care, behavioral health, urology, neurology, inpatient rehabilitation, and diagnostic imaging, including 3D mammography. Baystate Wing Hospital (Baystate Wing) is a 74-bed facility located in Palmer, Massachusetts helping people in a service area that includes three counties - Hampden, Hampshire, and Worcester. The hospital services approximately 120,000 residents in seventeen towns, with over half of this population living in Belchertown, Ludlow, Palmer, Wilbraham, and Ware. We offer a broad range of medical, surgical, and psychiatric services. Our expanded Emergency Department (ED) provides comprehensive emergency services for adults and children around the clock. The emergency department includes a six-bed critical care unit and is a primary stroke center designated by the Massachusetts Department of Public Health (MDPH). Our hospital offers comprehensive, personalized, and high-quality inpatient and outpatient behavioral health and addiction treatment services through the Griswold Behavioral Health Center and the Center for Geriatric Psychiatry. Baystate Medical Practices (BMP) is a multi-specialty group of over 950 physicians and advanced practice clinicians in primary care, specialty, and surgical disciplines with more than 100 practices across 85 locations. BMP offers patient-centered care, including family practice, internal medicine and pediatric providers, community health centers, urgent care clinics, suburban and rural practices. Many sites are designated P.</p>

Form and Line Reference	Explanation
Part VI, Line 6	<p>atient Centered Medical Homes, signifying our emphasis on communication with patients, col laboration among providers, and continuity of care BMP's policy is to provide care to any patient in need of medical care, regardless of the patient's ability to pay for such care Dependent upon the patient's financial capability to pay and consistent with Baystate Health and BMP policies, BMP may provide such care free of charge or at amounts below its normal charges In the tax year 2018 BMP provided \$1,501,091 in charity care In addition to the charity care provided to patients, BMP's physicians participate in many and varied on going community outreach initiatives in the areas of education, employment, safety and health BMP has also taken a leadership role in strengthening the health of disadvantaged citizens in surrounding communities including specific focus on HIV/AIDS and by providing physician staffing for three community-based health centers through Baystate Medical BMP faculty published 172 peer-reviewed articles in tax year 2018, acquiring and disseminating new knowledge to a broad audience These original research findings will improve the care we deliver to patients Visiting Nurse Association and Hospice of Western New England provides the highest quality care and supplies to patients and families, primarily in their homes It is a comprehensive in-home health care, hospice, and palliative care agency with a staff of over 450 managing more than 90,000 visits annually The home health team works together to ensure a safe and swift recovery from illness, accident, or surgery in the comfort of patients' home Visiting Nurse Association and Hospice of Western New England offers medical expertise through its extensive network of caregivers to support patients facing a serious or life limiting illness Each patient and family is cared for by certified and experienced nurses, therapists, social workers, hospice aides, spiritual and bereavement counselors, and volunteers This care team works together, with both the patient and family, to bring understanding, comfort, dignity and a sense of peace, as each patient journey towards the final stage of life Baystate Reference Laboratories is the region's largest reference laboratory and is staffed by 24 board-certified pathologists and over 500 technologists and support personnel Health New England is a nonprofit organization offering a range of health care plans including commercial, Medicaid, and Medicare supplemental coverage It is one of the largest managed care organizations in western Massachusetts In addition to the brief descriptions of some of the affiliated entities above, this further information speaks to activities of Baystate Health and its affiliates regarding promotion of community health In addition to its 12,000 employees, Baystate Health has medical staff, nurses, residents and fellows, medical students, nursing students, and allied health students who gain comprehensive medical education during the year A recognized leader in educational innovation, Baystate Health has been training doctors since 1914 In tax year 2018, over 350 residents and fellows in 10 residency and 26 fellowship programs trained at Baystate Health In addition, Baystate Health provided training to over 450 medical students completing clerkships and electives in various specialties There were over 1,000 nursing students and over 400 allied health students from local colleges and universities, completed clinical training as part of their associate, baccalaureate, master's and post-doctoral work Bay state Health is a nationally accredited provider of continuing education for the entire team of health care professionals Continuing education is provided through regional conferences, grand rounds, and internet courses</p>

Form and Line Reference	Explanation
Form 990, Schedule H, Part VI, Line 6 continued	<p>In tax year 2018, a record 161 nurses graduated from the Baystate Health Nurse Residency Program. The program is a one-year program for registered nurses with less than 12 months experience, offering practice-based experience, in-depth learning, and ongoing professional development. Baystate Health's Nurse Residency Program was Accredited with Distinction, the highest recognition awarded, as a Practice Transition Program by the American Nurses Credentialing Center's (ANCC) Commission on Accreditation. The program is one of the only four in the state of Massachusetts to receive ANCC accreditation. In tax year 2018, Baystate Health provided 31 nurses with forgivable nursing loans towards earning their ADN, BSN, masters, DNP, or PhD in nursing. The program was established in 2002 and to date has supported more than 580 RNs and student nurses providing more than \$2,250,000 in forgivable loans. In tax year 2018, Baystate Medical Center's Midwifery Education Program celebrated its 25th anniversary. There have been 116 graduates since the program's inception and the program has maintained a 100 percent certification rate by the American Midwifery Certification Board. This year, the Midwifery Program completed reaccreditation by the Accreditation Commission for Midwifery Education and received the maximum allowed length of accreditation through 2028. Baystate Health is one of 39 midwifery education programs in the country and the only program in Massachusetts. The program also conducts innovative interprofessional education with Baystate Health's OB/GYN residency program. In partnership with the University of Massachusetts Medical School, Baystate Health is now the regional campus for an innovative curriculum track called PURCH (Population-based Urban and Rural Community Health). The PURCH track focuses on addressing social determinants of health for our patients. The PURCH track is designed to prepare students to care for Baystate Health's diverse patient populations by providing classroom and clinical experiences in a variety of clinical settings, led by faculty who have expertise in population health and clinical effectiveness research. The goals of the program are to increase access to students in Massachusetts seeking an affordable medical education, to respond to the health care needs of the Commonwealth by increasing the number of Massachusetts physicians trained in urban and rural primary care, and to apply proven academic research methods to improve population health, reduce health disparities, and make health care better integrated, more efficient, and more effective. In tax year 2018, Baystate Springfield Educational Partnership (BSEP) ran courses for 275 students, primarily residents of Springfield. During the summer, BSEP provided theme-based workshops for 47 students, coordinated 32 summer internships at Baystate Medical, and placed 11 students in work experiences. Overall, more than 115 students have been hired as employees at Baystate Health. BSEP awarded a total of \$25,000 in scholarships for undergraduate and graduate education to 16 alumni students. The ten-year total of scholarships awarded now exceeds \$700,000. Volunteers enhance the work of our employees and interactions with our patients and families every day. In tax year 2018, more than 900 volunteers donated over 100,000 hours providing significant support of the care we provide to our community. In tax year 2018, over 212,000 language interpreter sessions helped patients and families better understand their care. The Interpreter and Translation Services department interpreted 72 languages in person, over the phone, and via video, and translated 3,642 pages of patient-related information. New languages included Oromo from Ethiopia, Foochow from a small region in China, Q'anjob'al (Kanjobal) from Guatemala, and Nepali Sign Language. In tax year 2018, covered lives in Baystate Health's Medicare Accountable Care Organization (ACO) rose from 43,000 to over 50,000. Baystate Health's Medicaid ACO is in its second year and teams have embarked on several novel clinical initiatives that have already demonstrated care transformation to improve quality and lower cost. Community Health Workers have completed a standard assessment of Social Determinants of Health, for example housing insecurity, food insecurity, transportation challenges, and others, that related to poverty and its effect on health. Over 35% of the population has been assessed, the highest rate of any MassHealth ACO, leading to early interventions to prevent illness. Utilization rates for skilled nursing facilities declined 27% over two years and emergency department use has fallen 39%. A newly formed Transition of Care Team at Baystate Medical meets with inpatients facing compliance challenges and continues to follow up with home visits within their first 30 days after discharge. Baystate Health and its affiliates are committed to providing the communities they serve throughout western Massac</p>

Form and Line Reference	Explanation
Form 990, Schedule H, Part VI, Line 6 continued	<p>Massachusetts with the resources necessary to stay informed and healthy by providing both basic and extensive educational opportunities such as parent education classes, including "Baystate's New Beginnings" Also offered are breastfeeding classes, prenatal/postnatal classes, and infant/toddler safety classes Some classes are free while others are offered at a reasonable fee No one is turned away due to inability to pay Baystate Health offers many free parenting support groups including breastfeeding gatherings, new parents groups, toddler groups, parents of multiples groups, and a MotherWoman support group Most of these groups meet weekly In addition, Baystate Health has a health science library staffed by professionals who help patients, families, and the general public access reliable health information The EMPOWER program at Baystate Franklin, designed to help pregnant women with opioid use disorder (OUD) have healthy babies and pursue healthier futures, received a two-year, \$1 million federal grant to expand the program Baystate Franklin partnered with the Center for Human Development (CHD) to pursue the grant The partnership will allow the agencies to form a medical/behavioral health home The home will provide expanded support to pregnant, postpartum and parenting women, ages 18 or older (who may also have a child/children 36 months or younger) with OUD and/or a history of opioid overdose The EMPOWER program currently serves approximately 30 women and families in Franklin County each year Baystate Medical implemented an enhanced way to care for newborns physiologically dependent on opioids and their mothers called the Rooming-in Program Previously, babies impacted by maternal OUD were admitted to the Neonatal Intensive Care Unit if they required pharmacological treatment for Neonatal Abstinence Syndrome Parents understood little about the process and length of stay averaged several weeks With the Rooming-in Program, eligible babies remain with their mothers in a private room throughout treatment, encouraging breastfeeding and bonding Mothers receive prenatal and postnatal education to better understand the process and how to care for their babies, leaving them empowered while significantly decreasing length of stay for these babies The Institute for Healthcare Improvement recognized Baystate Medical Center and Baystate Health's three community health centers as the first age-friendly health care institutions in the nation The national age-friendly health system movement focuses on improving care by attending to what matters most to patients, medications, mental activity, and mobility The honor recognized the efforts of the Acute Care for Elders program team and the interprofessional "Geri-Pal" team who recognize the unique problems of older adults, focus on what is most important to patients, and emphasize keeping those in their care as independent and active as possible They assist with care plans, choosing treatment options, recognizing drug side effects, and making difficult decisions Baystate Health has provided a safe way to dispose of unwanted medications and sharps through the installation of collection receptacles in the lobbies at each of its four hospitals Community members now have a resource for safely and confidentially throwing away household sharps (needles and other sharp or glass medical tools) and unused prescription medications These secure kiosks are available to the community 24 hours a day, seven days a week</p>

Form and Line Reference	Explanation
Form 990, Schedule H, Part VI, Line 6 continued	<p>The Mini-Medical School program is an eight-part health education series offered at Baystate Medical featuring a different aspect of medicine each week. Designed for an adult audience, each course is taught by an energetic faculty member who will explain the science of medicine without resorting to complex terms. Mini-Medical School gives Baystate Health the opportunity to open its doors to the public and share its knowledge of medicine in a comfortable and friendly environment. Many of the students participate due to a general interest and later find that many of the things they learned over the semester are relevant to their own lives. The goal of this program is to help members of the public make more informed decisions about all aspects of their health care while receiving insight on what it's like to be a medical student. Tuition is \$95 per person, \$80 for Senior Class and Every Woman members. Mini Medical School Alumni is over 2,000 members. Baystate Health offers 50+ free programs to seniors and women. Baystate Health Senior Class is a fee-free loyalty program dedicated to health and wellness offered exclusively for men and women ages 55 and over. The 21,000+ Senior Class members receive a quarterly newsletter with valuable health information, benefits and invitations to special events designed with their interests in mind. The free Baystate Every Women Loyalty Program offers its 15,000+ members the latest women's health information through seminars with physicians, nurses, and other medical professionals, in a comfortable and lively setting. The program is designed to increase knowledge of women's health issues, and in turn, provide women with the information they need to make the best decisions regarding their health. In tax year 2018, 22 employees were awarded forgivable loans to purchase their first home through the Mark R. Tolosky Baystate Neighbors Program. This Baystate Health benefit provides forgivable loans to employees purchasing their first home in the communities surrounding Baystate Health hospitals. To date, the program has provided more than \$2 million in forgivable home loans. Since its inception in 1994, Rays of Hope has been helping women and men in the fight against breast cancer by walking alongside them on their cancer journey. Through the Baystate Health Breast Network, Rays of Hope cares for the whole person from diagnosis and beyond by supporting research at the Rays of Hope Center for Breast Cancer Research, providing funding for state-of-the-art equipment, breast health programs, and outreach and education throughout Baystate Health as well as providing grants for complementary therapies and cancer programs to our community partners throughout western Massachusetts. Rays of Hope has raised over \$15.3 million to date. All funds raised remain local in western Massachusetts. The United Way develops and supports programs that directly improve the lives of people in our communities, a mission proudly shared by Baystate Health. Baystate Health is a strong supporter of the United Way, and a major contributor to the organization with workforce campaigns and thousands of employee donor and volunteers. Baystate Health's contributions help the United Way serve our families, friends, colleagues and others who seek help in different ways and at different times in their lives. Three community campaigns are held annually: Springfield, Westfield and Palmer workplace to support the United Way of Pioneer Valley, Greenfield workplace to support the United Way of Franklin County, and Ware workplace to support the United Way of Hampshire County. Employees can direct their donations to one or all of the United Way's action areas: Education, Income, and Health, or designate to a qualified agency with a minimum contribution. At the start of the tax year 2018 school year, Baystate Health employees throughout the region donated school supplies to their communities. At Baystate Medical, over 175 storage totes (the most yet) were filled with supplies to assist Springfield elementary school teachers with their "wish list" of classroom essentials. Baystate Wing Hospital and Baystate Mary Lane Outpatient Center employees donated over 1,500 items to teachers in Palmer and Ware Public Schools and Baystate Franklin Medical Center employees collected backpacks and school supplies to support the United Way of Franklin County's Annual Blooming Backpacks which, collected over 330 backpacks for children in Franklin County. Baystate Noble Hospital launched its successful first school supply drive to benefit Abner Gibbs Elementary School in Westfield. Baystate Medical held its annual "Spirit of Giving" Holiday Donation Drive for new and unwrapped toys, books, games, and other greatly needed items for children and families in the community. Baystate Health employees donated more than 2,500 new toys and \$1,000 in gift cards for children in the communities served by Baystate Community Health Centers at Mason Square, Brightwood,</p>

Form and Line Reference	Explanation
Form 990, Schedule H, Part VI, Line 6 continued	<p>and High Street, as well as Martin Luther King Jr Family Services, New North Citizens' Council, and the Ronald McDonald House in Springfield See also additional information regarding Baystate Health, Inc and its affiliate's promotion to community health above in Line 5 Form 990, Schedule H, Part VI, Line 7 List of States Receiving Community Benefit Report MA Additional disclosures related to 501(r) compliance In accordance with the guidance described in Revenue Procedure 2015-21, the hospital hereby discloses the following minor, inadvertent error, that was discovered by the Baystate internal tax department in October 2019, with respect to hospital's Community Health Needs Assessment (CHNA) that was completed in September 2019 Under 1 501(r)-2(b) of the Treasury Regulations, a hospital facility's error with respect to the implementation or operational requirements described in Treas Reg 1 501(r)-3, will not be considered a failure to meet a requirement of Section 501(r) if (1) such omission or error was minor and either inadvertent or due to reasonable cause, and (2) the hospital facility corrects such omission or error as promptly after discovery as is reasonable given the nature of the omission or error In Tax Year 2018 the hospital conducted its CHNA, which was adopted by the Board of Trustees prior to the September 30, 2019 year end The hospital inadvertently neglected to timely post the CHNA to the hospital website before the end of the tax year When it was determined that hospital had not uploaded the current CHNA to the hospital website, the Baystate tax department coordinated the posting of the CHNA with community benefits and the website department The posting was completed by the website department on November 13, 2019 Baystate has reviewed the current policies and procedures and is adopting a formal Community Benefits Policy to ensure compliance with the requirements of Section 501(r), and related regulations The system intends to regularly monitor the effectiveness of the adopted policies to ensure the hospital maintains compliance with Section 501(r) on an on-going basis As part of the process improvements, during future CHNA implementation years, Baystate will post interim reports on the system website in mid-summer, allowing for community and public review and comments, prior to publishing the final CHNA reports approved by the Board of Trustees at the end of September To the best of our knowledge, the delay did not affect any individuals, therefore the error will not be considered a failure to meet a requirement of Section 501(r) The hospital has corrected and is self-disclosing the inadvertent omission, and as of the filing of this form 990, the hospital is in compliance with Treas Reg 1 501(r)-3 requirements for completing its community health needs assessment</p>

# Additional Data

**Software ID:**

**Software Version:**

**EIN:** 04-2790311

**Name:** Baystate Medical Center Inc

## Form 990 Schedule H, Part V Section A. Hospital Facilities

Section A. Hospital Facilities		Licensed hospital	General medical & surgical	Children's hospital	Teaching hospital	Critical access hospital	Research facility	ER-24 hours	ER-other	Other (Describe)	Facility reporting group
(list in order of size from largest to smallest—see instructions) How many hospital facilities did the organization operate during the tax year? <b>1</b>											
Name, address, primary website address, and state license number											
1	Baystate Medical Center Inc 759 Chestnut Street Springfield, MA 01199 2339	X	X	X	X		X	X			

**Section C. Supplemental Information for Part V, Section B.** Provide descriptions required for Part V, Section B, lines 1j, 3, 4, 5d, 6i, 7, 10, 11, 12i, 14g, 16e, 17e, 18e, 19c, 19d, 20d, 21, and 22. If applicable, provide separate descriptions for each facility in a facility reporting group, designated by "Facility A," "Facility B," etc.

Form and Line Reference	Explanation
Baystate Medical Center, Inc	<p>Part V, Section B, Line 5 The input of the community and other important regional stakeholders was an important part of the CHNA process. A wide range of stakeholders took part in the 2019 CHNA process, including local and regional public health and health departments, other local municipal agencies, diverse community-based organizations, advocacy organizations, healthcare providers, and community residents. These stakeholders provided input through a CHNA Regional Advisory Council (RAC), focus groups, key informant interviews, community conversations, and community chats. Additionally, community forums were conducted towards the end of the CHNA process to vet preliminary findings with community members. Please refer to the hospitals' CHNA Appendix I for a complete listing of public health, community representatives, and other stakeholders included in the process. The CHNA RAC included representatives from each Coalition member hospital/insurer as well as public health and community stakeholders from each hospital service area. Stakeholders on the RAC included local and regional public health and health department representatives, representatives from local and regional organizations serving or representing medically underserved, low-income or populations of color, and individuals from organizations that represent the broad interests of the community. The Coalition conducted a stakeholder analysis to ensure geographic, sector (e.g. schools, community service organizations, healthcare providers, public health, and housing), and racial/ethnic diversity of RAC. The RAC met in workgroups (Data and Reports, Engagement and Dissemination, and Health Equity) to guide the consultants in the process of conducting the CHNA, and prioritizing community health needs, CHNA findings, and dissemination of information. Assessment methods and findings were modified based on the RAC's feedback. The RAC consisted of 31 participants, including Coalition members and consultants. The RAC met monthly from September 2018 through June 2019. Key informant interviews and focus groups were conducted to gather information used to identify priority health needs and engage the community. Key informant interviews were conducted with healthcare providers, healthcare administrators, local and regional public health officials, and local leaders that represent the interests of the community or that serve medically underserved, low-income, or populations of color in the service area. Interviews with local and regional public health officials identified priority health areas and community factors that contribute to health needs. Focus group participants included community organization representatives, community members (low-income, people of color, and others), and other community stakeholders. Topics and populations included substance use, transgender health, older adults, youth, mental health, cancer care, gun violence, and rural food access. Key informant interviews and focus group</p>



**Section C. Supplemental Information for Part V, Section B.**Provide descriptions required for Part V, Section B, lines 1j, 3, 4, 5d, 6i, 7, 10, 11, 12i, 14g, 16e, 17e, 18e, 19c, 19d, 20d, 21, and 22. If applicable, provide separate descriptions for each facility in a facility reporting group, designated by "Facility A," "Facility B," etc.

Form and Line Reference	Explanation
Baystate Medical Center, Inc	s were conducted from February 2019 through March 2109 Focus groups and key informant int erviews engaged residents primarily in Hampden County, but also across the region The CHNA also used qualitative data from other hospital service areas as appropriate Baystate Hea lth held five Community Conversations and over 70 Community Chats Community Conversations were larger bidirectional information-sharing meetings conducted for each Baystate Hospit al service area and one done in Spanish in Springfield For Community Chats, RAC members b rought information about the CHNA and gathered priorities in regular meetings of service p roviders, community-based organizations, and hospital clinical staff and administrators W hile these outreach efforts were spearheaded by Baystate Health, the engagement and findin gs benefitted all Coalition member hospitals/insurer Conversations and Chats were held fr om January 2019 through April 2019 and engaged approximately 900 residents Five Community Forums were held upon completion of this report to share and validate the findings Two we re offered in Spanish with approximately 100 individuals representing the broad interests of the community, participants in the focus groups, interviews, Conversations and Chats, a nd community stakeholders representing medically underserved, low-income, and populations of color

**Form 990 Part V Section C Supplemental Information for Part V, Section B.**

**Section C. Supplemental Information for Part V, Section B.** Provide descriptions required for Part V, Section B, lines 1j, 3, 4, 5d, 6i, 7, 10, 11, 12i, 14g, 16e, 17e, 18e, 19c, 19d, 20d, 21, and 22. If applicable, provide separate descriptions for each facility in a facility reporting group, designated by "Facility A," "Facility B," etc.

Form and Line Reference	Explanation
Baystate Medical Center, Inc	Part V, Section B, Line 6a The Coalition of Western Massachusetts Hospitals/Insurer (Coalition) is a partnership between eight not-for-profit hospitals/insurer in western Massachusetts Baystate Medical Center, Baystate Franklin Medical Center, Baystate Noble Hospital, Baystate Wing Hospital, Cooley Dickinson Hospital, Mercy Medical Center (a member of Trinity Health-New England), Shriners Hospitals for Children-Springfield, and Health New England, a local health insurer whose service area covers the four counties of western Massachusetts The Coalition formed in 2012 to bring hospitals within western Massachusetts together to share resources and work in partnership to conduct their triennial CHNAs and address regional needs

**Form 990 Part V Section C Supplemental Information for Part V, Section B.**

**Section C. Supplemental Information for Part V, Section B.** Provide descriptions required for Part V, Section B, lines 1j, 3, 4, 5d, 6i, 7, 10, 11, 12i, 14g, 16e, 17e, 18e, 19c, 19d, 20d, 21, and 22. If applicable, provide separate descriptions for each facility in a facility reporting group, designated by "Facility A," "Facility B," etc.

Form and Line Reference	Explanation
Baystate Medical Center, Inc	Part V, Section B, Line 6b The Coalition of Western MA Hospitals/Insurer engaged the Public Health Institute of Western MA (PHIWM), based in Springfield, MA, as the lead consultant to conduct the CHNA's PHIWM was supported by three other consultant teams, Community Health Solutions (CES), based in Northampton, MA, Franklin Regional Council of Governments (FRCOG), based in Greenfield, MA, and Pioneer Valley Planning Commision (PVPC), based in Springfield, MA The Coalition includes Health New England, a local health insurer whose service area covers the four counties of western Massachusetts

**Form 990 Part V Section C Supplemental Information for Part V, Section B.**

**Section C. Supplemental Information for Part V, Section B.** Provide descriptions required for Part V, Section B, lines 1j, 3, 4, 5d, 6i, 7, 10, 11, 12i, 14g, 16e, 17e, 18e, 19c, 19d, 20d, 21, and 22. If applicable, provide separate descriptions for each facility in a facility reporting group, designated by "Facility A," "Facility B," etc.

Form and Line Reference	Explanation
Baystate Medical Center, Inc	Part V, Section B, Line 7d The hospital facility made its CHNA report widely available to the public via an email distribution, with links to the hospital's website, to community partners and organizations In addition, the CHNA reports have informed the implementation of county wide community health improvement plans in Franklin and Hampden counties Hospital and CHNA consultant staff have been invited to various venues and audiences to present on the CHNA process and key findings The Coalition created a Facebook page, "Western MA CHNA", as a means to communicate with and engage the community throughout the CHNA process All Coalition CHNAs were posted and shared via this Facebook page

**Form 990 Part V Section C Supplemental Information for Part V, Section B.**

**Section C. Supplemental Information for Part V, Section B.** Provide descriptions required for Part V, Section B, lines 1j, 3, 4, 5d, 6i, 7, 10, 11, 12i, 14g, 16e, 17e, 18e, 19c, 19d, 20d, 21, and 22. If applicable, provide separate descriptions for each facility in a facility reporting group, designated by "Facility A," "Facility B," etc.

Form and Line Reference	Explanation
Baystate Medical Center, Inc	<p>Part V, Section B, Line 11 The hospital facility anticipates health needs and available resources may change, therefore, a flexible approach was adopted in the development of its implementation strategy. For example, certain community health needs may become more pronounced and require changes to the initiatives identified by the hospital in the Strategy. Other community organizations may address certain needs, indicating that the hospital's strategies should be refocused on alternative community health needs or assume a different focus on the needs identified in the 2019 CHNA. The hospital facility views a community benefits implementation strategy as a "LIVING" document. Baystate hospitals have adopted the term Strategic Implementation Plan (SIP), in lieu of Implementation Strategy. The significant health needs to be addressed by the hospital are referred to as priority focus areas in the SIP. Due to the evolving climate in health care, the hospital's financial health year to year remains unknown, therefore hospital resources and inputs may increase, decrease, or need to be modified. The hospital's SIP work plan provides an opportunity for the hospital to be strategic and focused, yet flexible in its community health planning and improvement efforts. The hospital facility, in partnership with its Community Benefits Advisory Council reviews the work plans quarterly and the hospital updates the work plans on the hospital website annually. No health care system or hospital facility can address all the significant health needs present in its community. The hospital facility is committed to adhering to its mission and remaining financially healthy so that it can continue to enhance its clinical excellence and patient experience, as well as address significant health needs identified in the CHNA. The hospital facility's implementation strategy does not explicitly address all the priority community health needs identified in the 2019 CHNA due to, 1 limited resources (time, talent and treasure), 2 the hospital is a stakeholder and/or partner in addressing the directly or indirectly through other hospital clinical and service lines and community partnerships, 3 other hospitals or community organizations within the service area are addressing the need, 4 the need falls outside of the hospitals' mission or limited resource capacity. Significant health needs, referred to by the hospital as priority focus areas, being addressed by the hospital include, education, mental health and substance use, violence and trauma, financial wellbeing, and built environment. Significant health needs not to be addressed include, environmental exposures, housing, social environment, basic needs, care coordination, culturally sensitive care, health literacy and language barriers, insurance and healthcare care related challenges. limited providers, Alzheimer's disease, chronic diseases, infant and perinatal health, and sexual health.</p>

**Form 990 Part V Section C Supplemental Information for Part V, Section B.**

**Section C. Supplemental Information for Part V, Section B.** Provide descriptions required for Part V, Section B, lines 1j, 3, 4, 5d, 6i, 7, 10, 11, 12i, 14g, 16e, 17e, 18e, 19c, 19d, 20d, 21, and 22. If applicable, provide separate descriptions for each facility in a facility reporting group, designated by "Facility A," "Facility B," etc.

Form and Line Reference	Explanation
Baystate Medical Center, Inc	Part V, Section B, Line 13b All patients with account balances (other than balances resulting from co-payments or deductibles on insured services) are eligible to receive a prompt pay discount of 20% of the balance for claims paid in full at time of service or within 60 days of the date of the initial bill Patients must request the discount The discount cannot be combined with the Hospital Supplemental Financial Assistance Program Baystate Medical Center offers a co-payment discount program for the patients receiving services in the emergency department of the hospital This discount program is available to all hospital emergency department patients with co-payment obligations under private or government health insurance (unless prohibited by law or a Baystate Medical Center's contract with a private insurer or government authority) These patients may reduce the otherwise applicable emergency department service co-payment by 10% if the patient elects to pay the co-payment at the conclusion of the patient's emergency department visit

**Form 990 Part V Section C Supplemental Information for Part V, Section B.**

**Section C. Supplemental Information for Part V, Section B.** Provide descriptions required for Part V, Section B, lines 1j, 3, 4, 5d, 6i, 7, 10, 11, 12i, 14g, 16e, 17e, 18e, 19c, 19d, 20d, 21, and 22. If applicable, provide separate descriptions for each facility in a facility reporting group, designated by "Facility A," "Facility B," etc.

Form and Line Reference	Explanation
Baystate Medical Center, Inc	Part V, Section B, Line 15e Baystate Medical Center (BMC) provides patients with information about the availability of State Programs, Health Safety Net, or the Hospital Supplemental Financial Assistance Program which may cover all or some of their unpaid BMC bills as well as about BMC discount programs For those patients who request such assistance, the hospital assists patients by screening them for eligibility in available State Programs and assisting them in applying for such programs When applicable, BMC may also assist patients in applying for coverage of services as a Medical Hardship based on the patient's documented income and allowable medical expenses BMC has contracted with the Executive Office of Health and Human Services and the Commonwealth Health Insurance Connector Authority to serve as a Certified Application Counselor Organization As a Certified Application Counselor (CAC), appropriate staff will inform a patient of the functions and responsibility of a CAC, seek that the patient sign a Certified Application Counselor Designation Form, and assist the patient in finding applicable financial assistance

**Form 990 Part V Section C Supplemental Information for Part V, Section B.**

**Section C. Supplemental Information for Part V, Section B.** Provide descriptions required for Part V, Section B, lines 1j, 3, 4, 5d, 6i, 7, 10, 11, 12i, 14g, 16e, 17e, 18e, 19c, 19d, 20d, 21, and 22. If applicable, provide separate descriptions for each facility in a facility reporting group, designated by "Facility A," "Facility B," etc.

Form and Line Reference	Explanation
Baystate Medical Center, Inc	Part V, Section B, Line 16j Paper copies of our financial assistance policy (FAP) and the FAP application, and a FAP plain language summary as well as the Billing and Collections Policy are available upon request, in English, Spanish, and Russian, and free of charge in the hospital and by mail, as well as the hospital facilities website <a href="https://www.baystatehealth.org/patients/billing-and-financial-assistance">https://www.baystatehealth.org/patients/billing-and-financial-assistance</a> A plain language summary of the FAP is offered to all patients at all registration sites including our full service health centers in the community - Baystate Brightwood Health Center and Baystate Mason Square Neighborhood Health Center In addition, copies of the full FAP, FAP application and Billing and Collections Policy are also available at all Registrations sites Copies of our community health needs assessment are available for viewing and download on our website at <a href="https://www.baystatehealth.org/about-us/community-programs/community-benefits/community-health-needs-assessment">https://www.baystatehealth.org/about-us/community-programs/community-benefits/community-health-needs-assessment</a> Hard copies of our CHNA are available upon request free of charge We have also shared our CHNA with all the community members who were involved with CHNA as well as each hospitals Community Benefits Advisory Council (CBAC) The hospital is committed to ongoing efforts to widely publicize our FAP and CHNA to the community, specifically, to low-income populations Additional efforts will include promotion via our hospitals various social media platforms and providing printed materials to key social service agencies and educating their staff that work with low income populations in the hospitals service area



<b>Form 990 Part V Section C Supplemental Information for Part V, Section B.</b>	
<b>Section C. Supplemental Information for Part V, Section B.</b> Provide descriptions required for Part V, Section B, lines 1j, 3, 4, 5d, 6i, 7, 10, 11, 12i, 14g, 16e, 17e, 18e, 19c, 19d, 20d, 21, and 22. If applicable, provide separate descriptions for each facility in a facility reporting group, designated by "Facility A," "Facility B," etc.	
Form and Line Reference	Explanation
Baystate Medical Center, Inc	Part V, Section B, Line 20e We rely on Medicaid for presumptive eligibility determinations We would perform these actions if needed but did not have any patient during the tax year where an ECA was initiated

**Form 990 Part V Section C Supplemental Information for Part V, Section B.**

**Section C. Supplemental Information for Part V, Section B.** Provide descriptions required for Part V, Section B, lines 1j, 3, 4, 5d, 6i, 7, 10, 11, 12i, 14g, 16e, 17e, 18e, 19c, 19d, 20d, 21, and 22. If applicable, provide separate descriptions for each facility in a facility reporting group, designated by "Facility A," "Facility B," etc.

Form and Line Reference	Explanation
Form 990, Schedule H, Part V, Line 7	7a <a href="https://www.baystatehealth.org/about-us/community-programs/community-benefits/community-health-needs-assessment">https://www.baystatehealth.org/about-us/community-programs/community-benefits/community-health-needs-assessment</a> 7b <a href="http://www.publichealthwm.org">www.publichealthwm.org</a>

Form 990 Part V Section C Supplemental Information for Part V, Section B.	
<b>Section C. Supplemental Information for Part V, Section B.</b> Provide descriptions required for Part V, Section B, lines 1j, 3, 4, 5d, 6i, 7, 10, 11, 12i, 14g, 16e, 17e, 18e, 19c, 19d, 20d, 21, and 22. If applicable, provide separate descriptions for each facility in a facility reporting group, designated by "Facility A," "Facility B," etc.	
Form and Line Reference	Explanation
Form 990, Schedule H, Part V, Line 10	10a <a href="https://www.baystatehealth.org/about-us/community-programs/community-benefits/community-health-needs-assessment">https://www.baystatehealth.org/about-us/community-programs/community-benefits/community-health-needs-assessment</a>

Section D. Other Health Care Facilities That Are Not Licensed, Registered, or Similarly Recognized as a Hospital Facility

(list in order of size, from largest to smallest)

How many non-hospital health care facilities did the organization operate during the tax year? \_\_\_\_\_

Name and address	Type of Facility (describe)
<b>1</b> 1 - Baystate Ambulatory Care Ctr 3300 Main Street Springfield, MA 01107	Outpatient Physician Offices
<b>1</b> 2 - Baystate Ambulatory Care Ctr 140 High Street Springfield, MA 01105	Outpatient Facility
<b>2</b> 3 - Baystate Breast and Wellness Center 100 Wason Avenue Suite 300 Springfield, MA 01107	Outpatient Facility
<b>3</b> 4 - Baystate Brightwood Health Center 380 Plainfield Street Springfield, MA 01107	Outpatient Clinic
<b>4</b> 5 - Baystate Children's Specialty Center 50 Wason Avenue 1st Floor Springfield, MA 01107	Outpatient Facility
<b>5</b> 6 - Baystate Imaging & Transplant Services 100 Wason Avenue Ground Floor Suite 21 Springfield, MA 01107	Outpatient Facility
<b>6</b> 7 - Baystate Mason Sq Neighborhood Hlth Ctr 11 Wilbraham Road Springfield, MA 01199	Outpatient Clinic
<b>7</b> 8 - Baystate Rehabilitation Care 21 Dwight Road Suite 106 Longmeadow, MA 01106	Rehabilitation Clinic
<b>8</b> 9 - Baystate Rehab Care Adult OP Svs 360 Birnie Avenue Springfield, MA 01107	Rehabilitation Clinic
<b>9</b> 10 - Baystate Rehabilitation Care Rymd Ctr 470 Granby Rd Ste 4 South Hadley, MA 01075	Rehabilitation Clinic
<b>10</b> 11 - Baystate Specialty Pharmacy 3300 Main Street Springfield, MA 01107	Outpatient Facility
<b>11</b> 12 - BMC Pain Management Center 3400 Main Street 2nd Flr Springfield, MA 01107	Outpatient Facility
<b>12</b> 13 - D'Amour Center for Cancer Care 3350 Main Street Springfield, MA 01199	Outpatient Cancer Center
<b>13</b> 14 - Baystate Medical Center Infusion Suite 2 Medical Center Drive 1st Floor Suite 1 Springfield, MA 01107	Outpatient Facility

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

Schedule I  
(Form 990)

Department of the  
Treasury  
Internal Revenue Service

Name of the organization  
Baystate Medical Center Inc

Grants and Other Assistance to Organizations,  
Governments and Individuals in the United States

Complete if the organization answered "Yes," on Form 990, Part IV, line 21 or 22.  
▶ Attach to Form 990.

▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No 1545-0047

2018

Open to Public  
Inspection

Employer identification number  
04-2790311

Part I General Information on Grants and Assistance

- 1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? . . . . . ☒ Yes ☐ No
- 2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States

Part II Grants and Other Assistance to Domestic Organizations and Domestic Governments. Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed

(a) Name and address of organization or government	(b) EIN	(c) IRC section (if applicable)	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of noncash assistance	(h) Purpose of grant or assistance
(1) See Additional Data							
(2)							
(3)							
(4)							
(5)							
(6)							
(7)							
(8)							
(9)							
(10)							
(11)							
(12)							

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table . . . . . 6

3 Enter total number of other organizations listed in the line 1 table . . . . . 0

**Part III Grants and Other Assistance to Domestic Individuals.** Complete if the organization answered "Yes" on Form 990, Part IV, line 22

Part III can be duplicated if additional space is needed

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of noncash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of noncash assistance
(1) Art therapy workshops for breast cancer survivors	1	11,091			
(2) Yoga and water dance for breast cancer survivors	1	8,130			
(3) Water fitness classes for women with breast cancer	1	10,340			
(3)					
(4)					
(5)					
(6)					
(7)					

**Part IV Supplemental Information.** Provide the information required in Part I, line 2; Part III, column (b); and any other additional information.

Return Reference	Explanation
Part I, Line 2	Explanation The Rays of Hope grants that are awarded are reviewed and approved by the Rays of Hope Community Advisory Board. Recipients are required to submit a Community Program Grant Application. As part of the application process the recipient is required to provide their SSN or EIN. Once the grant is awarded by the Advisory Board quarterly reports are submitted by the recipient to monitor the grant. A final report of the grant program and budget summary is due upon completion of the program.
Part III	For items in Part III the number of recipients are not easily quantified. Items are purchased in bulk and distributed as needed.

Additional Data

Software ID:  
Software Version:  
EIN: 04-2790311  
Name: Baystate Medical Center Inc

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
Cancer Connection Inc 41 Locust Street Northampton, MA 01060	04-3493483	501(c)(3)	25,353				Support groups, complementary therapies, workshops and classes for women living with breast cancer and their families and caregivers
Baystate Health Inc 759 Chestnut Street Springfield, MA 01199	04-2105941	501(c)(3)	18,248,000				Strategic initiatives

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
Pioneer Valley Riverfront Club 121 West Street Springfield, MA 01104	26-0251831	501(c)(3)	19,952				Breast cancer survivors dragon boat team
YMCA of Greater Springfield 275 Chestnut Street Springfield, MA 01104	04-1859893	501(c)(3)	35,942				Breast cancer survivors excercise program



Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
CHD Cancer House of Hope Inc 1999 Westfield Street West Springfield, MA 01089	04-2503926	501(c)(3)	17,579				Funding expenses of the most well-attended CHH programming utilized by women with breast cancer
YMCA of Greater Westfield 67 Court Street Westfield, MA 10185	04-2126585	501(c)(3)	7,230				Breast cancer survivors exercise program

Schedule J (Form 990)	Compensation Information	OMB No 1545-0047
		2018
		Open to Public Inspection
Department of the Treasury Internal Revenue Service	For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees ▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 23. ▶ Attach to Form 990. ▶ Go to <a href="http://www.irs.gov/Form990">www.irs.gov/Form990</a> for instructions and the latest information.	
Name of the organization Baystate Medical Center Inc		Employer identification number 04-2790311

Part I Questions Regarding Compensation		Yes	No
1a Check the appropriate box(es) if the organization provided any of the following to or for a person listed on Form 990, Part VII, Section A, line 1a Complete Part III to provide any relevant information regarding these items			
<input type="checkbox"/> First-class or charter travel	<input type="checkbox"/> Housing allowance or residence for personal use		
<input type="checkbox"/> Travel for companions	<input type="checkbox"/> Payments for business use of personal residence		
<input type="checkbox"/> Tax indemnification and gross-up payments	<input type="checkbox"/> Health or social club dues or initiation fees		
<input type="checkbox"/> Discretionary spending account	<input type="checkbox"/> Personal services (e g , maid, chauffeur, chef)		
b If any of the boxes in line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain		1b	
2 Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, officers, including the CEO/Executive Director, regarding the items checked in line 1a?		2	
3 Indicate which, if any, of the following the filing organization used to establish the compensation of the organization's CEO/Executive Director Check all that apply Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III			
<input checked="" type="checkbox"/> Compensation committee	<input type="checkbox"/> Written employment contract		
<input checked="" type="checkbox"/> Independent compensation consultant	<input checked="" type="checkbox"/> Compensation survey or study		
<input type="checkbox"/> Form 990 of other organizations	<input checked="" type="checkbox"/> Approval by the board or compensation committee		
4 During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization			
a Receive a severance payment or change-of-control payment?		4a	No
b Participate in, or receive payment from, a supplemental nonqualified retirement plan?		4b	Yes
c Participate in, or receive payment from, an equity-based compensation arrangement?		4c	No
If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III			
Only 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.			
5 For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of			
a The organization?		5a	No
b Any related organization?		5b	No
If "Yes," on line 5a or 5b, describe in Part III			
6 For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of			
a The organization?		6a	No
b Any related organization?		6b	No
If "Yes," on line 6a or 6b, describe in Part III			
7 For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described in lines 5 and 6? If "Yes," describe in Part III		7	No
8 Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III		8	No
9 If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?		9	

For each individual whose compensation must be reported on Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii). Do not list any individuals that are not listed on Form 990, Part VII.

**Note.** The sum of columns (B)(i)-(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable column (D) and (E) amounts for that individual.

See Additional Data Table

**Schedule J (Form 990) 2018**

**Part III Supplemental Information**

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

Return Reference	Explanation
Part I, Line 3	The compensation committee of Baystate Health, Inc. (the parent organization of the health care system to which the filing organization belongs) has been appointed through board resolution as the compensation committee of the filing organization. This committee consists entirely of individuals serving on the board of the filing organization. The individuals responsible for deliberating the compensation arrangement for the President would be those individuals who do not have a conflict of interest with respect to the compensation arrangement and would be considered independent for compensation deliberation purposes. The compensation of the President is established based on information provided by independent third party consultants for reasonableness and appropriate comparability data. The compensation is then established, reviewed and approved by the duly authorized compensation committee of Baystate Health, Inc. and all such deliberations and decisions are documented contemporaneously.

Return Reference	Explanation
Part I, Line 4b	<p>Michael Albert, MD - Supplemental Retirement of \$7,822 is included in column B This amount was earned and paid in 2018 Dennis W Chalke - Supplemental Retirement of \$151,701 is included in column B This amount was earned and paid in 2018 Mark A Keroack, MD Total Supplemental Retirement of \$351,037 is included in column B This amount was earned in 2018 Christine E Klucznik, MD Total Supplemental Retirement of \$6,265 is included in column B This amount was earned in 2018 Peter Lindenauer, MD - Supplemental Retirement of \$3,702 is included in column E This amount was earned and paid in 2018 Kevin P Moriarty, MD - Supplemental Retirement of \$22,859 is included in column B This amount was earned and paid in 2018 Douglas Salvador, MD - Supplemental Retirement of \$98,822 is included in column B This amount was earned and paid in 2018 Nancy Shendell-Falik- Total Supplemental Retirement of \$807,171 is included in column B This amount consists of \$157,132 earned and paid in 2018 and \$558,992 that was previously reported as deferred compensation in prior years Forms 990 and that is currently reported as taxable income This also includes \$91,047 of investment earnings on prior year contributions The amount is listed in Column F in accordance with reporting requirements</p>



# Additional Data

**Software ID:**  
**Software Version:**  
**EIN:** 04-2790311  
**Name:** Baystate Medical Center Inc

## Form 990, Schedule J, Part II - Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

(A) Name and Title		(B) Breakdown of W-2 and/or 1099-MISC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation in column (B) reported as deferred on prior Form 990
		(i) Base Compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
Holly Mason MD Trustee (as of 1/1/19)/ Surgeon, Onc	(i)	263,145	37,113	1,920	27,010	20,322	349,510	0
	(ii)	0	0	0	0	0	0	0
Kevin P Moriarty MD Trustee/Chief Ped Surg	(i)	565,382	106,924	30,187	23,375	8,507	734,375	0
	(ii)	0	0	0	0	0	0	0
Mark A Keroack MD Trustee/ President & CEO, BH	(i)	0	0	0	0	0	0	0
	(ii)	1,092,918	555,500	379,088	17,875	22,167	2,067,548	4,050
Michael P Albert MD Trustee (thru 12/31/18)/ Med Dir OR	(i)	280,578	38,478	18,640	38,108	23,639	399,443	0
	(ii)	0	0	0	0	0	0	0
Nancy Shendell-Falik President/ SVP Hospital Ops	(i)	0	0	0	0	0	0	0
	(ii)	586,056	270,564	862,824	17,875	27,332	1,764,651	558,992
Dennis W Chalke Treasurer	(i)	0	0	0	0	0	0	0
	(ii)	546,049	196,086	205,523	59,898	30,546	1,038,102	4,050
Kristin R Delaney Clerk	(i)	0	0	0	0	0	0	0
	(ii)	129,310	15,113	628	14,190	23,449	182,690	0
Christine Klucznik VP/ CNO	(i)	0	0	0	0	0	0	0
	(ii)	302,059	61,974	10,723	17,875	4,849	397,480	0
Tejas Gandhi VP/ COO	(i)	0	0	0	0	0	0	0
	(ii)	403,777	84,901	27,268	17,875	24,625	558,446	0
Peter Friedmann MD Assoc Dean Chief Res Officer	(i)	340,247	70,720	9,387	17,875	24,140	462,369	0
	(ii)	0	0	0	0	0	0	0
Amy Gottlieb MD Assoc Dean Chief Fac Devel	(i)	291,041	64,640	5,998	17,875	3,026	382,580	0
	(ii)	0	0	0	0	0	0	0
Peter Lindenauer MD Asst Dean Population Health	(i)	300,942	52,410	5,290	30,212	21,022	409,876	0
	(ii)	0	0	0	0	0	0	0
Deborah A Provost VP CAO CNO BPMC / CRO BH	(i)	251,560	45,973	18,491	69,410	18,346	403,780	0
	(ii)	0	0	0	0	0	0	0
Jasmine J Paadam MD CIS Physician Leader	(i)	256,996	36,146	20,602	16,500	327	330,571	0
	(ii)	0	0	0	0	0	0	0

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

Schedule K  
(Form 990)

Department of the Treasury  
Internal Revenue Service

Name of the organization  
Baystate Medical Center Inc

Supplemental Information on Tax-Exempt Bonds

► Complete if the organization answered "Yes" to Form 990, Part VI, line 24a. Provide descriptions, explanations, and any additional information in Part VI.  
► Attach to Form 990.  
► Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No 1545-0047

2018

Open to Public Inspection

Employer identification number  
04-2790311

Part I Bond Issues												
(a) Issuer name		(b) Issuer EIN	(c) CUSIP #	(d) Date issued	(e) Issue price	(f) Description of purpose	(g) Defeased		(h) On behalf of issuer		(i) Pool financing	
							Yes	No	Yes	No	Yes	No
A	MA Health & Educ Facil Authority - Ser G	04-2456011	57586CNHA	10-27-2005	71,740,000	MA HEFA Series G - See Part VI		X		X		X
B	MA Health & Educ Facil Authority - Ser H	04-2456011		01-18-2007	10,000,000	MA HEFA Series H - See Part VI		X		X		X
C	MA Health & Educ Facil Authority - Ser M2	04-2456011		06-30-2008	10,157,671	MA HEFA Series M2 - See Part VI		X		X	X	
D	MA Health & Educ Facil Authority - Ser IJK	04-2456011	57586EKC4	06-25-2009	198,611,250	MA HEFA Series IJK - See Part VI		X		X		X

Part II		Proceeds							
		A		B		C		D	
1	Amount of bonds retired . . . . .	42,540,000		8,444,445		6,508,575		63,380,000	
2	Amount of bonds legally defeased . . . . .								
3	Total proceeds of issue . . . . .	71,740,000		10,000,000		10,157,671		199,122,425	
4	Gross proceeds in reserve funds . . . . .					43,671			
5	Capitalized interest from proceeds . . . . .								
6	Proceeds in refunding escrows . . . . .								
7	Issuance costs from proceeds . . . . .	735,004		72,250				1,845,403	
8	Credit enhancement from proceeds . . . . .							93,479	
9	Working capital expenditures from proceeds . . . . .								
10	Capital expenditures from proceeds . . . . .	6,990,000		9,927,750				132,183,543	
11	Other spent proceeds . . . . .	64,014,996				10,114,000		65,000,000	
12	Other unspent proceeds . . . . .								
13	Year of substantial completion . . . . .	2005		2006		1999		2012	
		Yes	No	Yes	No	Yes	No	Yes	No
14	Were the bonds issued as part of a current refunding issue? . . . . .		X		X	X		X	
15	Were the bonds issued as part of an advance refunding issue? . . . . .	X			X		X		X
16	Has the final allocation of proceeds been made? . . . . .	X		X		X		X	
17	Does the organization maintain adequate books and records to support the final allocation of proceeds? . . . . .	X		X		X		X	

Part III Private Business Use									
		A		B		C		D	
		Yes	No	Yes	No	Yes	No	Yes	No
1	Was the organization a partner in a partnership, or a member of an LLC, which owned property financed by tax-exempt bonds? . . . . .		X		X		X		
2	Are there any lease arrangements that may result in private business use of bond-financed property? . . . . .		X		X		X		



Part III

Private Business Use (Continued)

		A		B		C		D	
		Yes	No	Yes	No	Yes	No	Yes	No
<b>3a</b>	Are there any management or service contracts that may result in private business use of bond-financed property? . . . . .	X		X		X			
<b>b</b>	If "Yes" to line 3a, does the organization routinely engage bond counsel or other outside counsel to review any management or service contracts relating to the financed property?	X		X		X			
<b>c</b>	Are there any research agreements that may result in private business use of bond-financed property? . . . . .	X		X		X			
<b>d</b>	If "Yes" to line 3c, does the organization routinely engage bond counsel or other outside counsel to review any research agreements relating to the financed property?	X		X		X			
<b>4</b>	Enter the percentage of financed property used in a private business use by entities other than a section 501(c)(3) organization or a state or local government . . . . . ▶	0 020 %							
<b>5</b>	Enter the percentage of financed property used in a private business use as a result of unrelated trade or business activity carried on by your organization, another section 501(c)(3) organization, or a state or local government . . . . . ▶	0 020 %							
<b>6</b>	Total of lines 4 and 5 . . . . .	0 040 %							
<b>7</b>	Does the bond issue meet the private security or payment test? . . .		X		X		X		
<b>8a</b>	Has there been a sale or disposition of any of the bond-financed property to a nongovernmental person other than a 501(c)(3) organization since the bonds were issued? . . . . .		X		X		X		
<b>b</b>	If "Yes" to line 8a, enter the percentage of bond-financed property sold or disposed of . .								
<b>c</b>	If "Yes" to line 8a, was any remedial action taken pursuant to Regulations sections 1 141-12 and 1 145-2? . . . . .								
<b>9</b>	Has the organization established written procedures to ensure that all nonqualified bonds of the issue are remediated in accordance with the requirements under Regulations sections 1 141-12 and 1 145-2? . . . . .	X		X		X			

Part IV

Arbitrage

		A		B		C		D	
		Yes	No	Yes	No	Yes	No	Yes	No
<b>1</b>	Has the issuer filed Form 8038-T, Arbitrage Rebate, Yield Reduction and Penalty in Lieu of Arbitrage Rebate? . . .		X		X		X		X
<b>2</b>	If "No" to line 1, did the following apply? . . . .								
<b>a</b>	Rebate not due yet? . . . . .		X		X		X		X
<b>b</b>	Exception to rebate? . . . . .		X	X			X		X
<b>c</b>	No rebate due? . . . . .	X			X	X		X	
	If "Yes" to line 2c, provide in Part VI the date the rebate computation was performed . . . . .								
<b>3</b>	Is the bond issue a variable rate issue? . . . . .	X		X		X		X	
<b>4a</b>	Has the organization or the governmental issuer entered into a qualified hedge with respect to the bond issue?	X			X		X		X
<b>b</b>	Name of provider . . . . .	Citibank							
<b>c</b>	Term of hedge . . . . .	2070 0000000000 %							
<b>d</b>	Was the hedge superintegrated? . . . . .		X						
<b>e</b>	Was the hedge terminated? . . . . .		X						

**Part IV Arbitrage** (Continued)

	<b>A</b>		<b>B</b>		<b>C</b>		<b>D</b>	
	<b>Yes</b>	<b>No</b>	<b>Yes</b>	<b>No</b>	<b>Yes</b>	<b>No</b>	<b>Yes</b>	<b>No</b>
<b>5a</b> Were gross proceeds invested in a guaranteed investment contract (GIC)?		X		X		X		X
<b>b</b> Name of provider . . . . .								
<b>c</b> Term of GIC . . . . .								
<b>d</b> Was the regulatory safe harbor for establishing the fair market value of the GIC satisfied? . . . . .								
<b>6</b> Were any gross proceeds invested beyond an available temporary period?		X		X		X		X
<b>7</b> Has the organization established written procedures to monitor the requirements of section 148? . . .	X		X		X		X	

**Part V Procedures To Undertake Corrective Action**

	<b>A</b>		<b>B</b>		<b>C</b>		<b>D</b>	
	<b>Yes</b>	<b>No</b>	<b>Yes</b>	<b>No</b>	<b>Yes</b>	<b>No</b>	<b>Yes</b>	<b>No</b>
Has the organization established written procedures to ensure that violations of federal tax requirements are timely identified and corrected through the voluntary closing agreement program if self-remediation is not available under applicable regulations?	X		X		X		X	

**Part VI Supplemental Information.** Provide additional information for responses to questions on Schedule K (see instructions).

Return Reference	Explanation
Date Rebate Computation Performed	Issuer Name MA Health & Educ Facil Authority - Ser G Date the Rebate Computation was Performed 09/27/2006 Issuer Name MA Health & Educ Facil Authority - Ser M2 Date the Rebate Computation was Performed 06/18/2013 Issuer Name MA Health & Educ Facil Authority - Ser IJK Date the Rebate Computation was Performed 08/24/2012

Return Reference	Explanation
Bond Issues Supplemental Information	<p>A - MHEFA Series G Bonds Part I - Per the Official Statement, the purpose of the bond proceeds is (i) to advance refund \$61,930,000 principal amount of the Authority's Revenue Bonds, Baystate Medical Center (the Institution) Issue, Series E (the "Series E Bonds"), which were issued July 11, 1996 to finance or refinance the following property owned by the Institution (a) construction of a new 104,500 gross square foot Ambulatory Care Center at 3300 Main Street, Springfield, Massachusetts, (b) construction of a new 100,000 gross square foot building to house the Ambulatory Surgery Center, Medical Library and education/conference space on the Institution's North campus located at 759 Chestnut Street, Springfield, Massachusetts, (c) renovation of various existing spaces within the Institution's North campus, and (d) acquisition of equipment for the new facilities, (ii) to finance routine capital construction, renovations, and equipping of various facilities of the Institution, and (iii) to pay certain costs of issuance of the Series G Bonds B- MHEFA Series H Bonds Part I - Per the Official Statement, the purpose of the bond proceeds is (i) the construction, improvement, equipping, and other related capital expenditures of a parking garage walkway, and other related work at an existing building at 280 Chestnut Street owned and used by the Institution, and (ii) the acquisition and installation of capital equipment and renovations to existing facilities of the Institution and other routine capital expenditures in connection with the Institution's hospital operations C- MHEFA Series M-2, Pool 2 Part I - Per the Loan Document the purpose of the bond is to refinance Baystate Medical Center's MHEFA Pool J-2 Loan, which was issued February 2, 1999 to finance the acquisition and equipping of the property located at 280 Chestnut Street, Springfield, Massachusetts (the "Property"), and the renovation of the Property and existing facilities of the Institution and the acquisition of capital equipment for the Institution's existing facilities The MHEFA indebtedness listed is a pool loan, therefore the issue price, Parts I, II, III, and IV (Lines 5-7) are being answered with respect to the Baystate Medical Center loan alone rather than with respect to proceeds loaned to other conduit borrowers The actual date of issue of the MHEFA Series M2 Bonds was 5/30/2002, and the CUSIP number shown on Form 8038 was 57585KA57 While that issue was not a refunding issue, the purpose of the loan taken by BMC was to refund prior debt, as reflected in our response to Part II, Line 14 Accordingly, Part III has not been completed, as the original project was financed with bonds issued prior to 2003 D- MHEFA Series I, J-1, J-2, K-1, K-2 Part I - Per the Official Statement, the purpose of the bond proceeds is (i) to pay a portion of the costs associated with the acquisition of land, site development, construction or alteration of buildings or the acquisition or installation</p>

Return Reference	Explanation
Bond Issues Supplemental Information	<p>of furnishings and equipment, refinancing of, or any combination of the foregoing, in connection with the construction, improvement, equipping, and other related capital expenditures of a seven-story, approximately 599,100 gross square foot primarily inpatient building located at 759 Chestnut Street, Springfield, Massachusetts, including demolition and site work, which building will be constructed by Baystate Total Home Care (BTHC) and leased to Baystate Medical Center by BTHC, (ii) for the acquisition and installation of capital equipment and renovations to existing facilities of the Medical Center and other routine capital expenditures included or to be included in the Medical Center's capital budget over the next three years for use in connection with the Medical Center's hospital operations, (iii) for the refinancing of a portion of an outstanding commercial loan in the amount of \$65,000,000 made by Bank of America, N.A. on October 20, 2008 to the Medical Center in connection with the defeasance of the Authority's Revenue Bonds, Baystate Medical Center Issue, Series D, issued September 16, 1993, (iv) for the financing of costs associated with the issuance of bonds and, (v) financing of routine capital construction, renovations, and equipping of various facilities of Baystate Medical Center</p> <p>E - MDFA Revenue Bonds, Series L Part I - Per the Official Statement, the purpose of the bond proceeds is for the construction, improvement, and other capital expenditures relating to the build-out of an equipping of certain interior space within a seven-story approximately 599,100 gross square foot primarily inpatient building owned by Baystate Total Home Care, Inc. and leased to the Institution located at 759 Chestnut Street, Springfield, Massachusetts, such build-out to consist of space to be used for the Emergency Department of the Institution and ancillary support areas and the financing costs associated with the issuance of the bonds</p> <p>F - MDFA Revenue Bonds Series M - Part I - The purpose of the bond proceeds is (i) to advance refund \$39,907,339 principal amount of Massachusetts Health and Education Facilities Authority's Revenue Bonds, Baystate Medical Center (the Institution) Issue, Series F (the "Series F Bonds"), issued June 12, 2002 the proceeds of which financed the Construction of a new Cancer Center with a partial third floor medical record and support area, acquisition of a surgery center facility, certain renovations and equipment acquisitions, and (ii) finance costs of issuance relating to the Bond</p> <p>G - MDFA Revenue Bonds Series N - Part I - The purpose of the bond proceeds is (i) capital expenditures, including capitalized interest, in connection with the following projects (the "Project"), a) the build-out of and equipping of certain interior space within a seven-story, approximately 599,100 gross square foot primarily inpatient building owned by BTHC and leased to Baystate Medical Center located at 759 Chestnut Street, Springfield, Ma</p>

Return Reference	Explanation
Bond Issues Supplemental Information	ssachusetts, such build-out to include inpatient rooms, operating rooms, and inpatient pha rmacy, and b) the acquisition of medical equipment, information technology equipment, and other equipment and assets to be owned or leased and used by the Medical Center at the Med ical Center's health care facilities located at 759 Chestnut Street, Springfield, Massachu setts, 3300,3350,3400 and 3601 Main Street, Springfield, Massachusetts and 50, 80, and 100 Wason Avenue, Springfield, Massachusetts, and (ii) costs of issuance relating to the Bond s

Return Reference	Explanation
H - MDFA Revenue Bonds Series O	<p>Part I - The purpose of the bond proceeds is to indirectly finance the following (a) the construction, improvement, equipping, and other related capital expenditures of a seven-story, approximately 599,100 gross square foot primarily inpatient building located at 759 Chestnut Street, Springfield, Massachusetts, including demolition and site work, which building was constructed by BTHC and leased to the Medical Center by BTHC, and (b) the acquisition and installation of capital equipment and renovations to existing facilities of the Medical Center and other routine capital expenditures included or to be included in the Medical Center's capital budget over a three-year period for use in connection with the Medical Center's hospital operations at the following facilities of the Medical Center Springfield Building (including all wings and attached buildings), located at 759 Chestnut Street, Springfield, Massachusetts (the principal uses of which include Cardiac Services, Medical Services, Lab, and Inpatient Beds), Wesson Women and Infants Building, 759 Chestnut Street, Springfield, Massachusetts (the principal uses of which include Birthing Services, Neonatal Services, and Inpatient Beds), Daly Building (formerly the Centennial Building), 759 Chestnut Street, Springfield, Massachusetts (the principal uses of which include Emergency Room, Radiology, MRI, Ultrasound, Ambulatory and Inpatient Pharmacies, Lab, Operating Rooms, Inpatient Beds, ElectroPhysio Labs, ICU, and PICU), Daly Parking Garage, 759 Chestnut Street, Springfield, Massachusetts (a patient and visitor parking garage), D'Amour's Center for Cancer Care, 3350 Main Street, Springfield, Massachusetts (primarily used for Clinical Cancer Services), Chestnut Building, 759 Chestnut Street, Springfield, Massachusetts (primarily used for Ambulatory Surgery, Library, and Simulation Center), and Whitney Avenue Building (specifically capital expenditures related to information technology), 361 Whitney Avenue, Holyoke, Massachusetts (used for general health system purposes)</p> <p>I - MDFA CoGen Lease A Part I - The purpose of the lease is to finance the construction of an approximately 5,000 square foot co-generational, combined heat and power plant providing electricity, chilled water and steam to the facilities of the Institution</p> <p>J - MDFA LA #1 Lease B Part I - The purpose of the lease is to finance the acquisition and installation of a linear accelerator</p> <p>K - MDFA LA #2 Lease Part I The purpose of the lease is to finance the acquisition and installation of a linear accelerator</p> <p>L - MDFA Series P-1 Part I - The Bond is being issued for the purpose of providing funds to refund on an advance basis a portion of the \$63,380,000 aggregate stated principal amount outstanding as of the date hereof of the Revenue Bonds, Baystate Medical Center Issue, Series I (the "Refunded Bonds"), the proceeds of which were used to pay a portion of the construction costs of a new hospital building located at 759 Chestnut Street</p>

Return Reference	Explanation
H - MDFA Revenue Bonds Series O	<p> eet, Springfield, Massachusetts Part I and Part II, Differences between the issue price ( Part I) and total proceeds (Part II, Line 3) are due to investment earnings Part III, Lin es 4 and 5, Column D (Series IJK) As the refunded bonds were issued prior to January 1, 2 003, this question is being answered solely with respect to the new money portion of the b onds Part III, Column G (Series M) As these bonds refunded debt issued prior to January 1, 2003, the organization is availing itself of the Part III reporting exemption available for such bonds Part IV, Line 2c, Column C (Series M-2) The Issuing Authority engages an outside consultant to prepare rebate computations As of the most recent computation peri od, May 29, 2017 no rebate was owed The cumulative rebate amount is zero as of the outsid e consultant's most recent report Part IV, Line 6, Column A (Series G) This question is being answered without regard to yield-restricted advance funding escrow financed with pro ceeds of the bonds </p>

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

Schedule K  
(Form 990)

Department of the Treasury  
Internal Revenue Service

Name of the organization  
Baystate Medical Center Inc

Supplemental Information on Tax-Exempt Bonds

► Complete if the organization answered "Yes" to Form 990, Part VI, line 24a. Provide descriptions, explanations, and any additional information in Part VI.  
► Attach to Form 990.  
► Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No 1545-0047

2018

Open to Public Inspection

Employer identification number  
04-2790311

Part I Bond Issues											
(a) Issuer name	(b) Issuer EIN	(c) CUSIP #	(d) Date issued	(e) Issue price	(f) Description of purpose	(g) Defeased		(h) On behalf of issuer		(i) Pool financing	
						Yes	No	Yes	No	Yes	No
A MA Development Finance Agency - Ser L	04-3431814		11-02-2011	25,000,000	MA DFA Series L - See Part VI		X		X		X
B MA Development Finance Agency - Ser M	04-3431814		08-09-2012	40,137,000	MA DFA Series M - See Part VI		X		X		X
C MA Development Finance Agency - Ser N	04-3431814	57583UN79	11-06-2014	60,742,119	MA DFA Series N - See Part VI		X		X		X
D MA Development Finance Agency - Ser O	04-3431814	000000000	05-12-2016	20,000,000	MDFA Series O-see Part VI		X		X		X

Part II		Proceeds							
		A		B		C		D	
1	Amount of bonds retired . . . . .	4,538,685		8,675,000				2,797,385	
2	Amount of bonds legally defeased . . . . .								
3	Total proceeds of issue . . . . .	25,022,063		40,137,000		60,788,027		20,000,000	
4	Gross proceeds in reserve funds . . . . .								
5	Capitalized interest from proceeds . . . . .								
6	Proceeds in refunding escrows . . . . .								
7	Issuance costs from proceeds . . . . .	168,438		229,661		753,513			
8	Credit enhancement from proceeds . . . . .								
9	Working capital expenditures from proceeds . . . . .								
10	Capital expenditures from proceeds . . . . .	24,853,625				60,032,514		20,000,000	
11	Other spent proceeds . . . . .			39,907,339					
12	Other unspent proceeds . . . . .								
13	Year of substantial completion . . . . .	2012		2004		2016		2016	
		Yes	No	Yes	No	Yes	No	Yes	No
14	Were the bonds issued as part of a current refunding issue? . . . . .		X	X			X		X
15	Were the bonds issued as part of an advance refunding issue? . . . . .		X		X		X		X
16	Has the final allocation of proceeds been made? . . . . .	X		X		X		X	
17	Does the organization maintain adequate books and records to support the final allocation of proceeds? . . . . .	X		X		X		X	

Part III Private Business Use									
		A		B		C		D	
		Yes	No	Yes	No	Yes	No	Yes	No
1	Was the organization a partner in a partnership, or a member of an LLC, which owned property financed by tax-exempt bonds? . . . . .		X		X		X		
2	Are there any lease arrangements that may result in private business use of bond-financed property? . . . . .		X		X		X		



Part III Private Business Use (Continued)		A		B		C		D	
		Yes	No	Yes	No	Yes	No	Yes	No
3a	Are there any management or service contracts that may result in private business use of bond-financed property? . . . . .	X		X		X			
b	If "Yes" to line 3a, does the organization routinely engage bond counsel or other outside counsel to review any management or service contracts relating to the financed property?	X		X		X			
c	Are there any research agreements that may result in private business use of bond-financed property? . . . . .		X	X		X			
d	If "Yes" to line 3c, does the organization routinely engage bond counsel or other outside counsel to review any research agreements relating to the financed property?			X		X			
4	Enter the percentage of financed property used in a private business use by entities other than a section 501(c)(3) organization or a state or local government . . . . . ▶								
5	Enter the percentage of financed property used in a private business use as a result of unrelated trade or business activity carried on by your organization, another section 501(c)(3) organization, or a state or local government . . . . . ▶								
6	Total of lines 4 and 5 . . . . .								
7	Does the bond issue meet the private security or payment test? . . .		X		X		X		
8a	Has there been a sale or disposition of any of the bond-financed property to a nongovernmental person other than a 501(c)(3) organization since the bonds were issued? . . . . .		X		X		X		
b	If "Yes" to line 8a, enter the percentage of bond-financed property sold or disposed of . .								
c	If "Yes" to line 8a, was any remedial action taken pursuant to Regulations sections 1.141-12 and 1.145-2? . . . . .								
9	Has the organization established written procedures to ensure that all nonqualified bonds of the issue are remediated in accordance with the requirements under Regulations sections 1.141-12 and 1.145-2? . . . . .	X		X		X			

Part IV Arbitrage		A		B		C		D	
		Yes	No	Yes	No	Yes	No	Yes	No
1	Has the issuer filed Form 8038-T, Arbitrage Rebate, Yield Reduction and Penalty in Lieu of Arbitrage Rebate? . . . .		X		X		X		X
2	If "No" to line 1, did the following apply? . . . .								
a	Rebate not due yet? . . . . .		X		X	X		X	
b	Exception to rebate? . . . . .	X		X			X		X
c	No rebate due? . . . . .		X		X		X		X
	If "Yes" to line 2c, provide in Part VI the date the rebate computation was performed . . . . .								
3	Is the bond issue a variable rate issue? . . . . .	X		X			X		X
4a	Has the organization or the governmental issuer entered into a qualified hedge with respect to the bond issue?		X		X		X		X
b	Name of provider . . . . .								
c	Term of hedge . . . . .								
d	Was the hedge superintegrated? . . . . .								
e	Was the hedge terminated? . . . . .								

**Part IV Arbitrage** (Continued)

	<b>A</b>		<b>B</b>		<b>C</b>		<b>D</b>	
	<b>Yes</b>	<b>No</b>	<b>Yes</b>	<b>No</b>	<b>Yes</b>	<b>No</b>	<b>Yes</b>	<b>No</b>
<b>5a</b> Were gross proceeds invested in a guaranteed investment contract (GIC)?		X		X		X		X
<b>b</b> Name of provider . . . . .								
<b>c</b> Term of GIC . . . . .								
<b>d</b> Was the regulatory safe harbor for establishing the fair market value of the GIC satisfied? . . . . .								
<b>6</b> Were any gross proceeds invested beyond an available temporary period?		X		X		X		X
<b>7</b> Has the organization established written procedures to monitor the requirements of section 148? . . . .	X		X		X		X	

**Part V Procedures To Undertake Corrective Action**

	<b>A</b>		<b>B</b>		<b>C</b>		<b>D</b>	
	<b>Yes</b>	<b>No</b>	<b>Yes</b>	<b>No</b>	<b>Yes</b>	<b>No</b>	<b>Yes</b>	<b>No</b>
Has the organization established written procedures to ensure that violations of federal tax requirements are timely identified and corrected through the voluntary closing agreement program if self-remediation is not available under applicable regulations?	X		X		X		X	

**Part VI Supplemental Information.** Provide additional information for responses to questions on Schedule K (see instructions).

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

Schedule K  
(Form 990)

Supplemental Information on Tax-Exempt Bonds

► Complete if the organization answered "Yes" to Form 990, Part VI, line 24a. Provide descriptions, explanations, and any additional information in Part VI.  
► Attach to Form 990.  
► Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No 1545-0047

2018

Open to Public Inspection

Department of the Treasury  
Internal Revenue Service

Name of the organization  
Baystate Medical Center Inc

Employer identification number  
04-2790311

Part I Bond Issues											
(a) Issuer name	(b) Issuer EIN	(c) CUSIP #	(d) Date issued	(e) Issue price	(f) Description of purpose	(g) Defeased		(h) On behalf of issuer		(i) Pool financing	
						Yes	No	Yes	No	Yes	No
A MA Development Finance Agency - Cap Lease	04-3431814	000000000	09-22-2016	14,062,890	MDFA CoGen Lease - See Part VI		X		X		X
B MA Development Finance Agency - Cap Lease	04-3431814	000000000	12-29-2016	3,000,000	MDFA LA #1 Lease - See Part VI		X		X		X
C MA Development Finance Agency - Cap Lease	04-3431814	000000000	11-15-2017	2,937,110	MDFA LA #2 Lease - See Part VI		X		X		X
D MA Development Finance Agency - Ser P-1	04-3431814	000000000	12-21-2017	40,595,000	MA DFA Series P-1 - See Part VI		X		X		X

Part II		Proceeds							
		A		B		C		D	
1	Amount of bonds retired . . . . .	3,986,397		1,132,256		731,090		3,022,404	
2	Amount of bonds legally defeased . . . . .								
3	Total proceeds of issue . . . . .	14,076,660		3,000,772		2,939,696		40,595,000	
4	Gross proceeds in reserve funds . . . . .								
5	Capitalized interest from proceeds . . . . .								
6	Proceeds in refunding escrows . . . . .							39,871,232	
7	Issuance costs from proceeds . . . . .								
8	Credit enhancement from proceeds . . . . .								
9	Working capital expenditures from proceeds . . . . .								
10	Capital expenditures from proceeds . . . . .	14,076,660		3,000,772		2,939,696			
11	Other spent proceeds . . . . .							2,193,327	
12	Other unspent proceeds . . . . .								
13	Year of substantial completion . . . . .	2017		2017		2017		2017	
		Yes	No	Yes	No	Yes	No	Yes	No
14	Were the bonds issued as part of a current refunding issue? . . . . .		X		X		X		X
15	Were the bonds issued as part of an advance refunding issue? . . . . .		X		X		X	X	
16	Has the final allocation of proceeds been made? . . . . .		X		X		X	X	
17	Does the organization maintain adequate books and records to support the final allocation of proceeds? . . . . .	X		X		X		X	

Part III Private Business Use									
		A		B		C		D	
		Yes	No	Yes	No	Yes	No	Yes	No
1	Was the organization a partner in a partnership, or a member of an LLC, which owned property financed by tax-exempt bonds? . . . . .		X		X		X		X
2	Are there any lease arrangements that may result in private business use of bond-financed property? . . . . .		X		X		X		X

Part III Private Business Use (Continued)		A		B		C		D	
		Yes	No	Yes	No	Yes	No	Yes	No
3a	Are there any management or service contracts that may result in private business use of bond-financed property? . . . . .		X		X		X	X	
b	If "Yes" to line 3a, does the organization routinely engage bond counsel or other outside counsel to review any management or service contracts relating to the financed property?							X	
c	Are there any research agreements that may result in private business use of bond-financed property? . . . . .		X		X		X	X	
d	If "Yes" to line 3c, does the organization routinely engage bond counsel or other outside counsel to review any research agreements relating to the financed property?							X	
4	Enter the percentage of financed property used in a private business use by entities other than a section 501(c)(3) organization or a state or local government . . . . . ▶								
5	Enter the percentage of financed property used in a private business use as a result of unrelated trade or business activity carried on by your organization, another section 501(c)(3) organization, or a state or local government . . . . . ▶								
6	Total of lines 4 and 5 . . . . .								
7	Does the bond issue meet the private security or payment test? . . .		X		X		X		X
8a	Has there been a sale or disposition of any of the bond-financed property to a nongovernmental person other than a 501(c)(3) organization since the bonds were issued? . . . . .		X		X		X		X
b	If "Yes" to line 8a, enter the percentage of bond-financed property sold or disposed of . .								
c	If "Yes" to line 8a, was any remedial action taken pursuant to Regulations sections 1.141-12 and 1.145-2? . . . . .								
9	Has the organization established written procedures to ensure that all nonqualified bonds of the issue are remediated in accordance with the requirements under Regulations sections 1.141-12 and 1.145-2? . . . . .	X		X		X		X	

Part IV Arbitrage		A		B		C		D	
		Yes	No	Yes	No	Yes	No	Yes	No
1	Has the issuer filed Form 8038-T, Arbitrage Rebate, Yield Reduction and Penalty in Lieu of Arbitrage Rebate? . . . . .		X		X		X		X
2	If "No" to line 1, did the following apply? . . . . .								
a	Rebate not due yet? . . . . .	X		X		X		X	
b	Exception to rebate? . . . . .		X		X		X		X
c	No rebate due? . . . . .		X		X		X		X
	If "Yes" to line 2c, provide in Part VI the date the rebate computation was performed . . . . .								
3	Is the bond issue a variable rate issue? . . . . .		X		X		X		X
4a	Has the organization or the governmental issuer entered into a qualified hedge with respect to the bond issue?		X		X		X		X
b	Name of provider . . . . .								
c	Term of hedge . . . . .								
d	Was the hedge superintegrated? . . . . .								
e	Was the hedge terminated? . . . . .								

**Part IV Arbitrage** (Continued)

	<b>A</b>		<b>B</b>		<b>C</b>		<b>D</b>	
	<b>Yes</b>	<b>No</b>	<b>Yes</b>	<b>No</b>	<b>Yes</b>	<b>No</b>	<b>Yes</b>	<b>No</b>
<b>5a</b> Were gross proceeds invested in a guaranteed investment contract (GIC)?		X		X		X		X
<b>b</b> Name of provider . . . . .								
<b>c</b> Term of GIC . . . . .								
<b>d</b> Was the regulatory safe harbor for establishing the fair market value of the GIC satisfied? . . . . .								
<b>6</b> Were any gross proceeds invested beyond an available temporary period?		X		X		X		X
<b>7</b> Has the organization established written procedures to monitor the requirements of section 148? . . . .	X		X		X			X

**Part V Procedures To Undertake Corrective Action**

	<b>A</b>		<b>B</b>		<b>C</b>		<b>D</b>	
	<b>Yes</b>	<b>No</b>	<b>Yes</b>	<b>No</b>	<b>Yes</b>	<b>No</b>	<b>Yes</b>	<b>No</b>
Has the organization established written procedures to ensure that violations of federal tax requirements are timely identified and corrected through the voluntary closing agreement program if self-remediation is not available under applicable regulations?	X		X		X		X	

**Part VI Supplemental Information.** Provide additional information for responses to questions on Schedule K (see instructions).

Schedule L

(Form 990 or 990-EZ)

Department of the Treasury

Internal Revenue Service

Transactions with Interested Persons

▶ Complete if the organization answered "Yes" on Form 990, Part IV, lines 25a, 25b, 26, 27, 28a, 28b, or 28c, or Form 990-EZ, Part V, line 38a or 40b.  
▶ Attach to Form 990 or Form 990-EZ.  
▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No 1545-0047

2018

Open to Public Inspection

Name of the organization  
Baystate Medical Center Inc

Employer identification number  
04-2790311

Part I Excess Benefit Transactions (section 501(c)(3), section 501(c)(4), and 501(c)(29) organizations only)  
Complete if the organization answered "Yes" on Form 990, Part IV, line 25a or 25b, or Form 990-EZ, Part V, line 40b

1	(a) Name of disqualified person	(b) Relationship between disqualified person and organization	(c) Description of transaction	(d) Corrected?	
				Yes	No

2 Enter the amount of tax incurred by organization managers or disqualified persons during the year under section 4958 . . . . . ▶ \$

3 Enter the amount of tax, if any, on line 2, above, reimbursed by the organization . . . . . ▶ \$

Part II Loans to and/or From Interested Persons.  
Complete if the organization answered "Yes" on Form 990-EZ, Part V, line 38a, or Form 990, Part IV, line 26, or if the organization reported an amount on Form 990, Part X, line 5, 6, or 22

(a) Name of interested person	(b) Relationship with organization	(c) Purpose of loan	(d) Loan to or from the organization?		(e) Original principal amount	(f) Balance due	(g) In default?		(h) Approved by board or committee?		(i) Written agreement?	
			To	From			Yes	No	Yes	No	Yes	No
Total						▶ \$						

Part III Grants or Assistance Benefiting Interested Persons.  
Complete if the organization answered "Yes" on Form 990, Part IV, line 27.

(a) Name of interested person	(b) Relationship between interested person and the organization	(c) Amount of assistance	(d) Type of assistance	(e) Purpose of assistance

**Part IV Business Transactions Involving Interested Persons.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 28a, 28b, or 28c.

(a) Name of interested person	(b) Relationship between interested person and the organization	(c) Amount of transaction	(d) Description of transaction	(e) Sharing of organization's revenues?	
				Yes	No
(1) Kevin P Moriarty MD	Family member of Kevin P Moriarty, MD	70,550	See Part V - Family member of Kevin P Moriarty, MD employed by the filing organization		No
(2) James R Phaneuf CIC	Family member of James R Phaneuf, CIC	47,102	See Part V - Family member of James R Phaneuf CIC is employed by the filing organization		No

**Part V Supplemental Information**

Provide additional information for responses to questions on Schedule L (see instructions)

Return Reference	Explanation
------------------	-------------

**SCHEDULE O**  
(Form 990 or 990-EZ)

Department of the Treasury

Name of the organization  
Baystate Medical Center Inc

**Supplemental Information to Form 990 or 990-EZ**

Complete to provide information for responses to specific questions on Form 990 or 990-EZ or to provide any additional information.

▶ Attach to Form 990 or 990-EZ.

▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No 1545-0047

**2018**

**Open to Public Inspection**

**Employer identification number**

04-2790311

**990 Schedule O, Supplemental Information**

Return Reference	Explanation
Form 990, Part VI, Section A, line 1	The filing organization has a standing executive committee, which is entitled to act between meetings of the Board, on all matters as to which the Board is entitled to act and permitted by law to delegate to a committee The members of the executive committee are the same individuals serving on the executive committee of Baystate Health, Inc



**990 Schedule O, Supplemental Information**

Return Reference	Explanation
Form 990, Part VI, Section A, line 2	Two or more of the persons listed in this Form 990 Part VII have a business relationship with each other by virtue of sitting on one or more Boards of Directors or by serving in an employment relationship with one or more entities in the Baystate Group of affiliated entities and in the community. The following trustees, officers, or key employees have a business relationship: (1) Anne M. Paradis, Paul R. Murphy and Robert L. Pura, PhD, (2) John F. Maybury and Mark A. Keroack, MD, (3) Hector F. Toledo and Timothy F. Farrell.

# 990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part VI, Section A, line 3	Baystate Medical Center is affiliated with Baystate Administrative Services, Inc (BAS) which is a 501(c) (3) organization Information Technology, Human Resources, Finance, Treasury, Accounting and other management and support functions are delegated to BAS

# 990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part VI, Section A, line 6	The filing organization has one member, Baystate Health, Inc (BH)

## 990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part VI, Section A, line 7a	<p>The Board of Trustees of the filing organization are the same individuals serving as members of the Board of Trustees of Baystate Health, Inc (BH) with the addition of the president of the medical staff of the filing organization. The Board of Trustees of BH are elected annually by the Board of Trustees of BH at their annual meeting. Form 990, Part VI, Section A, line 8b. The Trustees of Baystate Medical Center meet during certain scheduled Baystate Health, Inc (BH) board meetings. The BH Board of Trustees and its committees, including the Audit and Compliance Committee, contemporaneously document meetings and actions relative to Baystate Medical Center, Inc as well as the annual acceptance of the audited financial statements.</p>

## 990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part VI, Section B, line 11b	<p>Prior to filing the Form 990, appropriate sections were reviewed by the Tax, Finance, and Human Resources areas of Baystate Health, Inc (the parent organization of the health care system to which the filing organization belongs) and by outside legal counsel. The Form 990 was also reviewed by tax experts from an independent accounting firm and signed-off as a paid preparer. The process, key areas and any new changes were reviewed prior to filing with the Baystate Health Audit and Compliance Committee (ACC), which is composed of trustees of the filing organization. The ACC members had an opportunity to ask questions regarding the tax compliance process and the tax filings in general. The Form 990 was provided to all members of the Board of Trustees prior to filing.</p>

**990 Schedule O, Supplemental Information**

Return Reference	Explanation
Form 990, Part VI, Section B, line 12c	<p>Baystate Medical Center, Inc is an affiliate of Baystate Health, Inc (BH) BH and its affiliated entities have a comprehensive conflict of interest policy applicable to all of the affiliated entities All directors, trustees, officers, key employees, and highest compensated employees of BH and its affiliates are asked to complete an annual "conflict of interest" form We utilize an electronic database to receive and manage all conflict of interest submissions This information is reviewed by the Chief Compliance Officer, Chief Executive Officer, Chair of the Board of Trustees, Chief General Counsel and the Chair of the Audit &amp; Compliance Committee A summary of the conflict of interest disclosures is provided to the Baystate Health Board of Trustees and the Tax Department Potential conflict of interest transactions are reviewed as appropriate under the policy, which provides for recusal from discussion and deliberation by any party with a potential conflict of interest</p>

**990 Schedule O, Supplemental Information**

Return Reference	Explanation
Form 990, Part VI, Section B, line 15b	<p>The compensation of the President is reviewed and determined annually by the compensation committee of Baystate Health, Inc (the parent organization of the health care system to which the filing organization belongs), which has been appointed through board resolution as the compensation committee of the filing organization. This committee consists entirely of individuals serving on the board of the filing organization. The individuals responsible for deliberating the compensation arrangement for the President would be those individuals who do not have a conflict of interest with respect to the compensation arrangement and would be considered independent for compensation deliberation purposes. The compensation of the President is established based on information provided by independent third party consultants for reasonableness and appropriate comparability data. The compensation is then established, reviewed and approved by the duly authorized compensation committee of Baystate Health, Inc.</p> <p>The compensation of the Senior Vice President, Finance, CFO and Treasurer is reviewed and determined annually by the compensation committee of Baystate Health, Inc (the parent organization of the health care system to which the filing organization belongs). The committee consists entirely of individuals serving on the board of Baystate Health, Inc. The individuals responsible for deliberating the compensation arrangement for the Senior Vice President, Finance, CFO and Treasurer and of the officers would be those individuals who do not have a conflict of interest with respect to the compensation arrangement and would be considered independent for compensation deliberation purposes. The compensation of the Senior Vice President, Finance, CFO and Treasurer is established based on information provided by independent third party consultants for reasonableness and appropriate comparability data. The compensation is then established, reviewed and approved by the duly authorized compensation committee of Baystate Health, Inc.</p> <p>The compensation of other officers and key employees of the filing organization is determined by the President of the filing organization in accordance with the Executive Compensation Philosophy Statement, in consultation with Human Resources, based on information provided by independent third party consultants for reasonableness including appropriate comparability data or the Baystate Health Board approved budget and wage program for each fiscal year.</p> <p>Line 15a has been answered No because the President and CEO is paid by Baystate Administrative Services, Inc, an affiliate and related organization of the filing organization. Form 990, Part VI, Section B, Line 16b Baystate Health, Inc has a joint venture policy that covers affiliated tax exempt entities including Baystate Medical Center.</p>

# 990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part VI, Section C, line 19	The organization makes its conflict of interest policy and financial statements available to the public at <a href="http://www.baystatehealth.org">www.baystatehealth.org</a> Articles of organization and bylaws are generally available at the Commonwealth of Massachusetts website



**990 Schedule O, Supplemental Information**

Return Reference	Explanation
Form 990, Part VII, Section A, Line 5	Certain officers or trustees of the filing organization are paid by an entity, Baystate Medical Practices, Inc (BMP) EIN 04-2888373, which is part of the health care system to which the filing organization belongs but does not meet the technical requirements as a "Related Organization" per Schedule R. Compensation from BMP to the officers and trustees of the filing organization therefore, is reported as paid from an unrelated organization in Line 5 and according to the instructions reported as though paid by the filing organization.

# 990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part IX, line 11g	<p>BMP Support Program service expenses 69,915,635 Management and general expenses 0 Fundraising expenses 0 Total expenses 69,915,635 Fees, Physicians Program service expenses 1,593,336 Management and general expenses 0 Fundraising expenses 0 Total expenses 1,593,336 Fees, Laboratory &amp; Clinical Program service expenses 14,638,309 Management and general expenses 0 Fundraising expenses 0 Total expenses 14,638,309 Purchased Service Program service expenses 6,663,514 Management and general expenses 2,484,849 Fundraising expenses 0 Total expenses 9,148,363 Supplementary Service Program service expenses 2,079,279 Management and general expenses 2,239,493 Fundraising expenses 0 Total expenses 4,318,772 Temporary Help-Other Program service expenses 10,958,103 Management and general expenses 312,714 Fundraising expenses 0 Total expenses 11,270,817 Consulting Program service expenses 3,553,154 Management and general expenses 1,949,067 Fundraising expenses 0 Total expenses 5,502,221 Contracted Service Program service expenses 4,964,001 Management and general expenses 517,671 Fundraising expenses 0 Total expenses 5,481,672 Subcontractor Program service expenses 1,453,084 Management and general expenses 0 Fundraising expenses 0 Total expenses 1,453,084 Transcription Service Program service expenses 1,041,787 Management and general expenses 0 Fundraising expenses 0 Total expenses 1,041,787 Garage Administrative Program service expenses 0 Management and general expenses 1,173,146 Fundraising expenses 0 Total expenses 1,173,146 Linen Service Program service expenses 3,824,425 Management and general expenses 0 Fundraising expenses 0 Total expenses 3,824,425 Wound Care Program Program service expenses 1,261,473 Management and general expenses 0 Fundraising expenses 0 Total expenses 1,261,473 Equipment Contact and Maintenance &amp; Repairs Program service expenses 2,687,737 Management and general expenses 308,194 Fundraising expenses 0 Total expenses 2,995,931 Commercial Insurance Outsourcing Fees Program service expenses 1,918,818 Management and general expenses 0 Fundraising expenses 0 Total expenses 1,918,818 Vehicle Repairs Program service expenses 264,543 Management and general expenses 455,825 Fundraising expenses 0 Total expenses 720,368 Temporary Help-Heart &amp; Vascular Program service expenses 2,568,825 Management and general expenses 0 Fundraising expenses 0 Total expenses 2,568,825 Temporary Help-Operating Room Program service expenses 814,911 Management and general expenses 0 Fundraising expenses 0 Total expenses 814,911 Temporary Help-Emergency Department Program service expenses 2,551,057 Management and general expenses 0 Fundraising expenses 0 Total expenses 2,551,057 Temporary Help-HIM Coding Program service expenses 1,645,604 Management and general expenses 0 Fundraising expenses 0 Total expenses 1,645,604 Contract Drug Dispensing Program service expenses</p>

# 990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part IX, line 11g	4,448,507 Management and general expenses 0 Fundraising expenses 0 Total expenses 4,448 ,507 Accreditation and Licensing Program service expenses 1,227,724 Management and gene ral expenses 828,627 Fundraising expenses 0 Total expenses 2,056,351 Courier Program s ervice expenses 1,163,163 Management and general expenses 0 Fundraising expenses 0 Total expenses 1,163,163

## 990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part XI, line 9	Transfer from affiliate for land, buildings and equipment 1,706,637 Transfer of funds to affiliated companies -63,858,009 Minimum pension liability adjustment -54,301,578 Funds utilized for property and equipment 697,525 Net assets released from restrictions from affiliates -15,137

SCHEDULE R  
(Form 990)

Department of the Treasury  
Internal Revenue Service

Related Organizations and Unrelated Partnerships

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.  
▶ Attach to Form 990.  
▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No 1545-0047

2018

Open to Public Inspection

Name of the organization  
Baystate Medical Center Inc

Employer identification number  
04-2790311

Part I Identification of Disregarded Entities

Complete if the organization answered "Yes" on Form 990, Part IV, line 33.

(a) Name, address, and EIN (if applicable) of disregarded entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Total income	(e) End-of-year assets	(f) Direct controlling entity
(1) Pioneer Valley Information Exchange LLC 101 Wason Avenue Suite 200 Springfield, MA 01107 04-2790311	Operation of a health information exchange and related activities	MA	241,436	426,347	Baystate Medical Center Inc

Part II Identification of Related Tax-Exempt Organizations

Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related tax-exempt organizations during the tax year.

See Additional Data Table

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	(g) Section 512(b)(13) controlled entity?	
						Yes	No

**Part III Identification of Related Organizations Taxable as a Partnership** Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related organizations treated as a partnership during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Predominant income(related, unrelated, excluded from tax under sections 512- 514)	(f) Share of total income	(g) Share of end-of-year assets	(h) Disproportionate allocations?		(i) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?		(k) Percentage ownership
							Yes	No		Yes	No	

**Part IV Identification of Related Organizations Taxable as a Corporation or Trust** Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related organizations treated as a corporation or trust during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Type of entity (C corp, S corp, or trust)	(f) Share of total income	(g) Share of end-of- year assets	(h) Percentage ownership	(i) Section 512(b) (13) controlled entity?	
								Yes	No
<b>(1)</b> HNE Advisory Services Inc Monarch Place Suite 1500 Springfield, MA 011441500 04-3012347	Administrative Services	MA	HNE Holding Corporation	C					No
<b>(2)</b> HNE Insurance Services Inc Monarch Place Suite 1500 Springfield, MA 011441500 04-3183019	Ancillary Insurance	MA	HNE Holding Corporation	C					No
<b>(3)</b> Ingraham Corporation 759 Chestnut Street Springfield, MA 01199 04-3016257	Health care and other business activities	MA	Baystate Health Inc	C					No
<b>(4)</b> HNE Holding Corporation Monarch Place Suite 1500 Springfield, MA 011441500 46-4620480	Holding shares in subsidiary corporation	MA	Health New England Inc	C					No
<b>(5)</b> HNE Insurance Company Inc Monarch Place Suite 1500 Springfield, MA 011441500 45-4462433	Health Ins svcs for Mass Medicare supplement members	MA	HNE Holding Corporation	C					No
<b>(6)</b> Baystate Health Insurance Company LTD North Church St Georgetown CJ 98-0421413	Offshore captive insurance	CJ	Baystate Health Inc	C					No

**Part V Transactions With Related Organizations** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35b, or 36.**Note.** Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule**1** During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?

	Yes	No
<b>a</b> Receipt of <b>(i)</b> interest, <b>(ii)</b> annuities, <b>(iii)</b> royalties, or <b>(iv)</b> rent from a controlled entity . . . . .		No
<b>b</b> Gift, grant, or capital contribution to related organization(s) . . . . .	Yes	
<b>c</b> Gift, grant, or capital contribution from related organization(s) . . . . .	Yes	
<b>d</b> Loans or loan guarantees to or for related organization(s) . . . . .		No
<b>e</b> Loans or loan guarantees by related organization(s) . . . . .		No
<b>f</b> Dividends from related organization(s) . . . . .		No
<b>g</b> Sale of assets to related organization(s) . . . . .		No
<b>h</b> Purchase of assets from related organization(s) . . . . .		No
<b>i</b> Exchange of assets with related organization(s) . . . . .		No
<b>j</b> Lease of facilities, equipment, or other assets to related organization(s) . . . . .	Yes	
<b>k</b> Lease of facilities, equipment, or other assets from related organization(s) . . . . .	Yes	
<b>l</b> Performance of services or membership or fundraising solicitations for related organization(s) . . . . .	Yes	
<b>m</b> Performance of services or membership or fundraising solicitations by related organization(s) . . . . .	Yes	
<b>n</b> Sharing of facilities, equipment, mailing lists, or other assets with related organization(s) . . . . .		No
<b>o</b> Sharing of paid employees with related organization(s) . . . . .		No
<b>p</b> Reimbursement paid to related organization(s) for expenses . . . . .		No
<b>q</b> Reimbursement paid by related organization(s) for expenses . . . . .	Yes	
<b>r</b> Other transfer of cash or property to related organization(s) . . . . .	Yes	
<b>s</b> Other transfer of cash or property from related organization(s) . . . . .	Yes	

**2** If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds

(a) Name of related organization	(b) Transaction type (a-s)	(c) Amount involved	(d) Method of determining amount involved
(1) Health New England Inc	Q	191,469,604	

Provide the following information for each entity taxed as a partnership through which the organization conducted more than five percent of its activities (measured by total assets or gross revenue) that was not a related organization. See instructions regarding exclusion for certain investment partnerships.

[illegible]



**Part VII**

**Supplemental Information**

Provide additional information for responses to questions on Schedule R (see instructions)

Return Reference	Explanation

Additional Data

Software ID:  
Software Version:  
EIN: 04-2790311  
Name: Baystate Medical Center Inc

Form 990, Schedule R, Part II - Identification of Related Tax-Exempt Organizations

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c) (3))	(f) Direct controlling entity	(g) Section 512 (b)(13) controlled entity?	
						Yes	No
759 Chestnut Street Springfield, MA 01199 04-2105941	Healthcare System Parent	MA	501 (c ) (3)	7	Baystate Health Inc		No
164 High Street Greenfield, MA 01301 04-2103575	Hospital	MA	501 (c ) (3)	3	Baystate Health Inc		No
40 Wright Street Palmer, MA 01069 22-2519813	Hospital	MA	501 (c ) (3)	3	Baystate Health Inc		No
30 Capital Drive Suite A West Springfield, MA 01089 04-2105803	Homehealth and Hospice care	MA	501 (c ) (3)	10	Baystate Health Inc		No
50 Maple Street Springfield, MA 01199 20-3260764	Real Estate and Other	MA	501 (c ) (3)	12b, II	Baystate Medical Center Inc		No
759 Chestnut Street Springfield, MA 01199 22-2747685	Administrative services	MA	501 (c ) (3)	12c, III	Baystate Health Inc		No
759 Chestnut Street Springfield, MA 01199 04-3549011	Fundraising	MA	501 (c ) (3)	7	Baystate Health Inc		No
115 West Silver Street Westfield, MA 010861634 22-2537423	Hospital	MA	501 (c ) (3)	3	Baystate Health Inc		No
115 West Silver Street Westfield, MA 010861634 04-3127730	Healthcare	MA	501 (c ) (3)	12a, I	Baystate Noble Hospital Corporation		No
Monarch Place Suite 1500 Springfield, MA 011441500 04-2864973	HMO/Insurance	MA	501 (c ) (4)		Baystate Health Inc		No
Monarch Place Suite 1500 Springfield, MA 011441500 46-5190134	HMO/Insurance	CT	501 (c ) (4)		Health New England		No
759 Chestnut Street Springfield, MA 01199 22-2531644	Voluntary Employees' Benefit Association	MA	501 (c ) (9)		Baystate Health Inc		No